

# CareerTech Information Management System (CTIMS)

## FLA Grants Complete User Guidebook



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**IMD** Information Management Division

December 2022

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**IMPORTANT:** For questions about specific FLA requirements or what content you need to input or attach with your worksheet, contact your ODCTE FLA Contact.

### CTIMS Support

If you have questions about submitting information in CTIMS, please contact CTIMS Support at [CTIMSSupport@careertech.ok.gov](mailto:CTIMSSupport@careertech.ok.gov), or contact:

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### Help and Troubleshooting

If you do not have a CTIMS account set up or are having trouble with the navigation or software, contact [CTIMSSupport@careertech.ok.gov](mailto:CTIMSSupport@careertech.ok.gov). Send a message describing your problem. Include your school name and your telephone number and we will contact you. Someone is always monitoring that inbox and will return your email swiftly.

If you have forgotten your password, click the **Forgot your password?** link to reset.

For helpful tips, see the [CTIMS Helpful Hints](#) section of this document.

**IMPORTANT:** Please log into CTIMS using the latest version of Microsoft Edge , Google Chrome , or Mozilla Firefox . CTIMS is currently not compatible with other browsers.

## Approval Process Overview

### **Worksheet Approval Stage (Stage 1)**

<b>FLA Role</b>	<b>Process</b>
FLA Local Initiative Coordinator	Creates, completes, saves, and submits the requests.
FLA Local Finance Coordinator	1 <sup>st</sup> approval. Reviews and approves/rejects requests.
FLA Local Superintendent/President	2 <sup>nd</sup> approval. Reviews and approves/rejects requests.
FLA State Initiative Coordinator	3 <sup>rd</sup> approval. Reviews and approves/rejects requests.
FLA State Initiative Supervisor	4 <sup>th</sup> approval. Reviews and approves/rejects requests.
ODCTE Contract Reviewer	Final approval. Reviews and approves/rejects requests.

### **Agreement Approval Stage (Stage 2)**

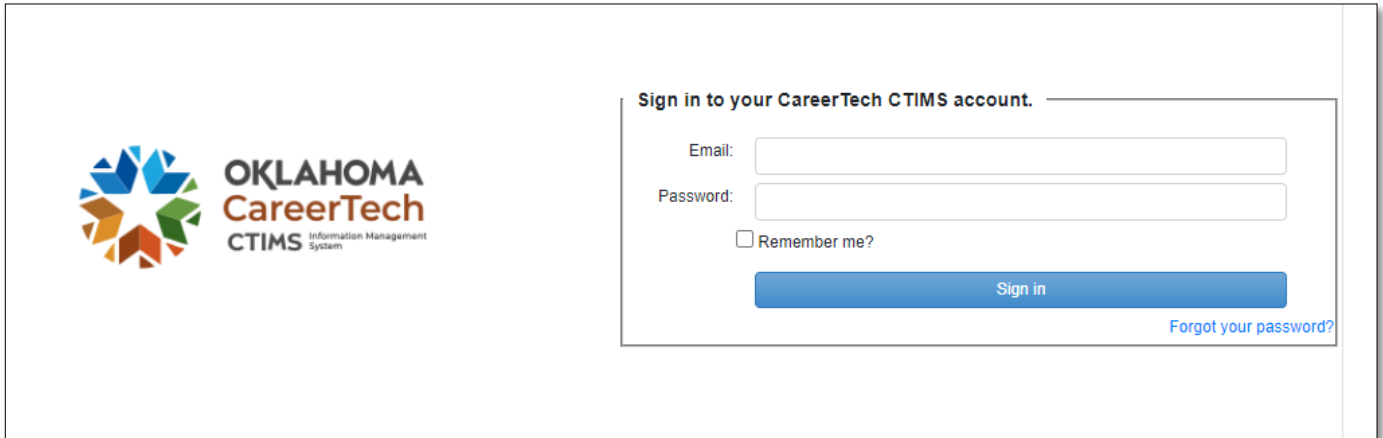
<b>FLA Role</b>	<b>Process</b>
FLA Local Finance Coordinator	1 <sup>st</sup> approval. Initiates, completes, and submits the requests.
FLA State Initiative Coordinator	2 <sup>nd</sup> approval. Reviews and approves/rejects requests.
FLA State Supervisor	Final approval. Reviews and approves/rejects requests.

**Invoice Approval Stage (Stage 3)**

<b>FLA Role</b>	<b>Process</b>
FLA Local Finance Coordinator	1 <sup>st</sup> approval. Initiates, completes, and submits the invoice.
FLA State Initiative Coordinator	2 <sup>nd</sup> approval. Reviews and approves/rejects invoice.
FLA State Initiative Supervisor	3 <sup>rd</sup> approval. Reviews and approves/rejects invoice.
ODCTE Finance Document Coordinator	4 <sup>th</sup> approval. Reviews and approves/rejects invoice.
ODCTE Finance Reviewer	Final approval. Reviews and approves/rejects invoice.

## Logging into CTIMS

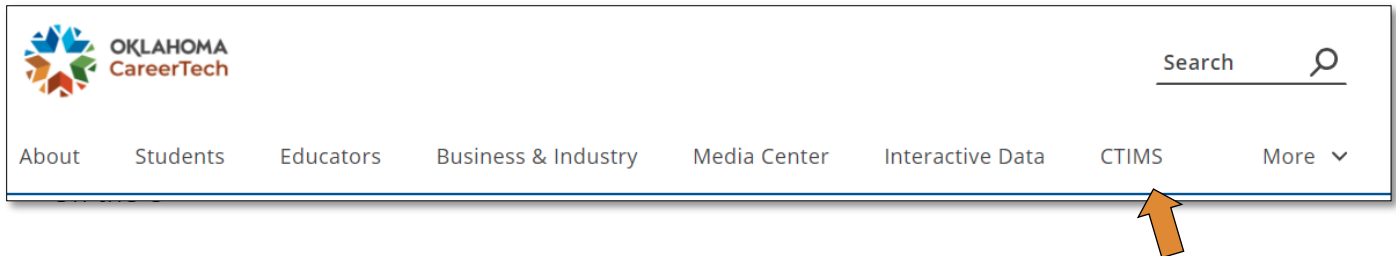
Sign in using your school email and CTIMS password at  
<https://ctims.okcareertech.org/CTBDSWeb>



The screenshot shows the login interface for the Oklahoma CareerTech CTIMS system. On the left is the logo, which consists of a colorful star-like icon made of triangles and the text "OKLAHOMA CareerTech CTIMS Information Management System". On the right, there is a sign-in box with the heading "Sign in to your CareerTech CTIMS account." Below this heading are two input fields: "Email:" and "Password:". Below the password field is a checkbox labeled "Remember me?". A blue "Sign in" button is positioned below the checkbox. To the right of the button is a link that says "Forgot your password?".

Or,

Go to <http://www.okcareertech.org/> and select the **CTIMS** tab.








TIMS website, select the green **CTIMS Login** button.

## CTIMS (CareerTech Information Management System)

### CTIMS Login and Assistance



- Microsoft Edge , Mozilla Firefox , or Google Chrome  are currently the only browsers compatible with CTIMS.
- [Setting up your CTIMS Account](#)
- For help with CTIMS, contact the Information Management Division via email: [CTIMSSupport@careertech.ok.gov](mailto:CTIMSSupport@careertech.ok.gov)
- Support available Monday through Thursday 7:00 - 5:00 and Fridays 7:00 - 4:00

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# Worksheet Process

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**IMD** Information Management Division

## Worksheet Process Flow

The following roles represent the stages required in CTIMS for the submission of a New Worksheet (Application).

**Stage 1 - FLA Local Initiative Coordinator** – Creates, completes, saves and submits new worksheet.



**Stage 2 - FLA Local Finance Coordinator** – 1<sup>st</sup> Approval. Reviews and approves or rejects worksheet. If approved, goes to next stage. If rejected, goes back to stage 1



**Stage 3 - FLA Local Superintendent/CEO** – 2<sup>nd</sup> Approval. Reviews and approves or rejects worksheet. If approved, goes to State approval stage. If rejected, goes back to stage 1.



**Stage 4 - State Initiative Coordinator** - 3<sup>rd</sup> Approval. ODCTE state staff reviews and approves or rejects worksheet. If approved, goes to final approval stage. If rejected, goes back to stage 1.



**Stage 5 - State Initiative Supervisor** – 4<sup>th</sup> Approval. ODCTE State Supervisor approves or rejects the worksheet. If approved goes to the final approval stage.

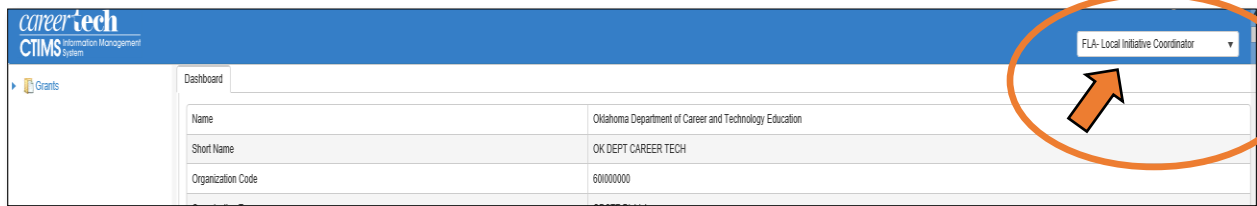


**Stage 6 – ODCTE Contract Reviewer**– Final Approval. After the worksheet is approved through Stage 6, the Agreement Process begins with the FLA Local Finance Coordinator.

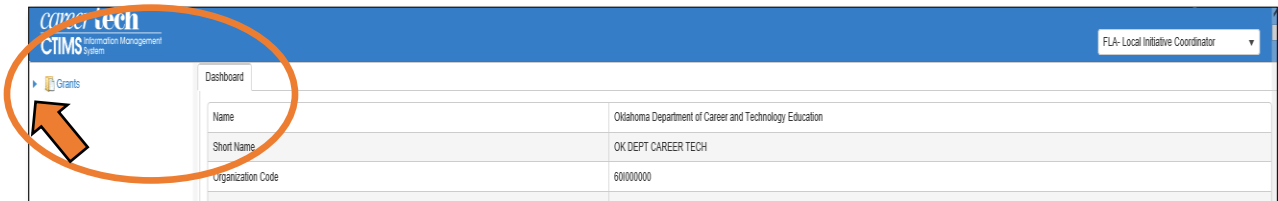
## Local Coordinator

### Starting a New Worksheet

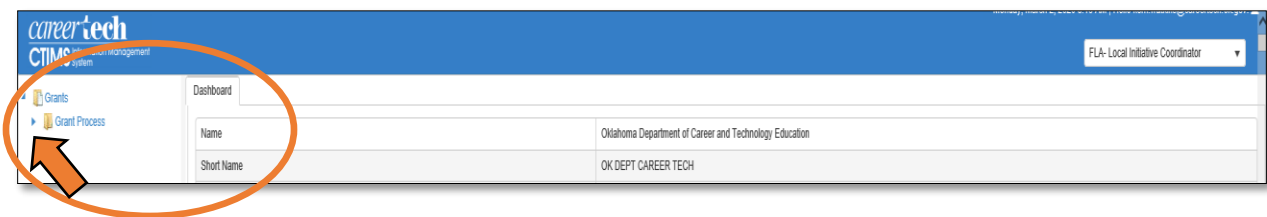
Verify that you are signed in with the role of **FLA Local Initiative Coordinator**. In the top right corner. Use the drop-down arrow to select this role.



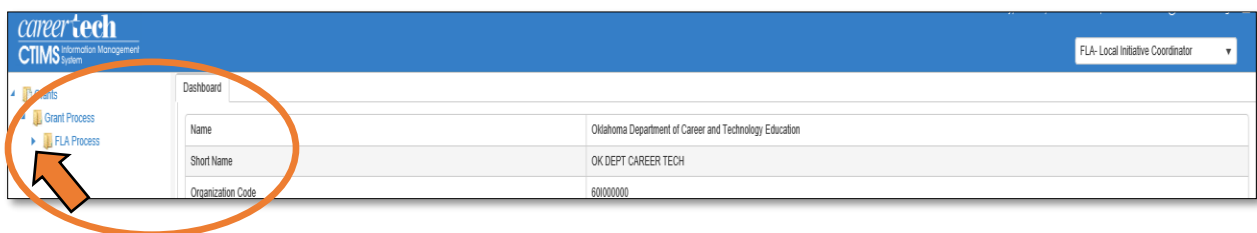
- Click the arrow ► next to **Grants** on left navigation.



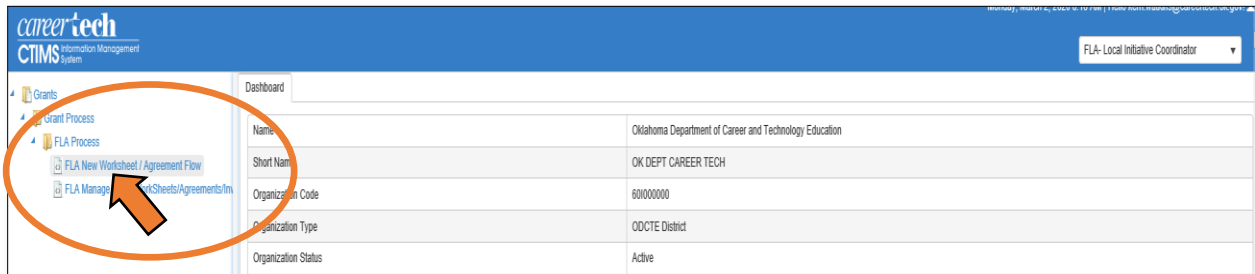
- Click the arrow ► next to **Grant Process** on left navigation.



- Click the arrow ► next to **FLA Process** on left navigation.



- Select **FLA New Worksheet/Agreement Flow** on the left navigation.



## FLA Grant Submit Worksheet - Step 1

Complete the **FLA Grant Submit Worksheet – Step 1** form. **The tagged numbers on the screen shot correspond to the instruction steps below.** Many of these fields will automatically display based on your organization login credentials. Verify that all the information is correct for your school.

**NOTE:** The red asterisks\* on the form represents a required field.

1. Select an **Organization Type**, such as Comprehensive School District, Technology Center District, College District or College name.
2. Select an **Organization**. Type the first three letters of your school or organization name and select it from the drop-down menu.
3. Select an **Organization District** if it does not automatically appear, or if you need to select a different Organization District.
4. Select a **Program Initiative** from the dropdown menu. The Worksheet No. automatically displays after selecting the Program Initiative.
5. Verify that **Client Type** is Business Masters.
6. Select an **Organization** by typing in the first three letters of the organization name. This name should be the same as #2. The **Business Code** is associated with the Organization and automatically displays after an **Organization** is selected.
7. After verifying that all information is correct, click the **Save & Next** button.

The screenshot shows the 'FLA Grant Submit Worksheet - Step 1' form. The form is divided into two main sections: 'Grant Information' and 'Client Basic Information For work Sheet'. The 'Grant Information' section includes fields for Fiscal Calendar Year, Organization Type, Organization District, Worksheet No., Grant Fund Type, Organization, Program Initiative, and Client Type. The 'Client Basic Information For work Sheet' section includes fields for Organization and Business Code. Red numbers 1 through 7 are placed next to specific fields to correspond with the instruction steps. The form is titled 'FLA Grant Submit Worksheet - Step 1' and has a 'Save & Next' button at the bottom right.

## FLA Grant Submit Worksheet - Step 2 – Funding Request Details

- Expand the **Funding Request Details** form by clicking on the plus (+) sign next to **Funding Request Details**.
- Complete each section of the form. This process contains several sections, so you must scroll down to access and complete all the sections.

**NOTE:** You must put something in each box that has a red asterisk (\*). There are some small required check boxes you must check to certify the information. There are links to other resources that will help you complete the form, as well as links to required templates and forms for you to download, complete and attach.

**TIP:** You can cut and paste from another document to fill in the boxes.

The screenshot displays the 'FLA Grant Submit Worksheet - Step 2' interface. The sidebar on the left contains the following sections: 'Provider Organization Details', 'Basic Client Information', 'Attachments', and 'Funding Request Details'. The 'Funding Request Details' section is expanded, showing a welcome message and a form with several required fields marked with red asterisks. An orange arrow points to the 'Funding Request Details' section in the sidebar, and another orange arrow points to the 'Save & Next' button in the top right corner.

FLA- Local Initiative Coordinator

Dashboard FLA New Worksheet / Agreement Flow X

FLA Grant Submit Worksheet - Step 2

Worksheet Summary Save & Next

+ Provider Organization Details

+ Basic Client Information

+ Attachments

- Funding Request Details

Welcome to the FY17 Carl Perkins Application:

Please fill out all questions based off of your school's plan for the FY17 fiscal year.

SECTION 1: FFATA INFORMATION COLLECTION REQUIREMENTS.

Enter your Data Universal Numbering System number\*

I certify that the DUNS number listed above is correct and active for my school or organization.\*

Enter your Fiscal Agent's extended mailing zip code\*

I certify that the Zip+4 listed above is correct and active for my school or organization.\*

Please provide your Oklahoma Federal Congressional District Number.\*

I certify that as the fiscal agent receiving funding that all required information is updated and active within the System for Award Management (SAM) (www.sam.gov).\*

In your organization's preceding completed fiscal year, did your organization receive (1) 80% or more of your annual gross revenues in U.S. federal contracts, subcontracts, loans, grants, subgrants, and/or cooperative agreements; and (2) \$25,000,000 or more in annual gross revenues from U.S. federal contracts, subcontracts, loans, grants, subgrants, and/or cooperative agreements?\*

### IMPORTANT:

- You must finish the **Funding Request Details** section and click **Save and Next** for any of the information to be saved.
- If you cannot finish all fields, you can put a placeholder character in the fields (all required fields must have something in them), and click **Save and Next**.
- When you return to edit these fields, use the **FLA Manage Grant Worksheet/Agreement** to go into your worksheet or budget to update. Do not use the **FLA New Worksheet/Agreement Flow** option, as this will start a whole new worksheet.

## FLA Grant Submit Worksheet - Step 4 – Budget Line Items

- Expand the **Budget Line Items** section by clicking on the plus (+) sign next to **Budget Line Items**.

The screenshot shows the 'FLA Grant Submit Worksheet - Step 4' interface. The 'Provider Organization Details' section is visible, showing fields for Fiscal Calendar Year, Organization Type, Organization District, Worksheet No., Grant Fund Type, Organization, Program Initiative, and Worksheet No. The 'Budget Line Items' section is expanded, indicated by an orange circle and an arrow pointing to the plus sign next to it.

- On the **Budget Line Items** screen, you click the **Add Budget Line**, **Remove Budget Line**, or **Cancel Budget Line Changes**.

To add a Budget Line Item:

1. Type a **Budget Line Desc** (Budget Line Description).
2. Complete **Req. Units** (Required Units).
3. Complete **Req. Unit Cost** (Required Unit Cost).
4. Complete **Req Unit Type** (Required Unit Type).
5. Click **Add Budget Line** to add more budget lines and repeat steps 1-4.
6. Type a **Note** in the space below the line-item budget area if desired.
7. Add supporting or required attachments by clicking on the **+Attachments** tab.

The screenshot shows the 'OKLAHOMA DEPARTMENT OF CAREER TECH EDUCATION - FLA Local Initiative Coordinator' interface. The 'Add Budget Line' tab is selected, showing a table with columns: Budget Line Desc, Req. Units, Req. Unit Cost, Req. Unit Type, Work Sheet Total, Req. Total, and Status. Four orange arrows point to the 'Req. Units', 'Req. Unit Cost', 'Req. Unit Type', and 'Work Sheet Total' columns. The 'Note' field is visible below the table.



8. You can **Save as Draft** at this point and it will save all the information on the **Funding Request Details** form and the **Budget Line Items** without submitting for approval. This will let you stop the process and resume at a later time. You can make any changes you need to the **Funding Request Details** or the **Budget Line Items** before you submit by selecting the line and making the changes.

## FLA Grant Submit Worksheet - Step 2 – Attachments

- After completing the **Funding Request Details** form expand the **Attachments** section by clicking on the plus (+) sign next to **Attachments**.
- To attach the required documents, click the **Browse** button and find the document on your computer.
- Click **Upload & Save File**.

The screenshot shows the 'Attachments' section of the worksheet. It includes a 'Browse:' label, a 'Browse...' button, and an 'Upload & Save file' button. An orange oval highlights these two buttons, with two orange arrows pointing to them. Below the buttons is a text area for 'Attachment Note:'. At the bottom right, there are three buttons: 'Active/Inactive file(s)', 'Delete file(s)', and 'Download all files'.

## FLA Grant Submit Worksheet – Step 3 – Acknowledgements

- After completing the **Attachments** section, when the worksheet is ready for submission, expand the **Acknowledgements** section by clicking on the plus (+) sign next to **Acknowledgements**.
- Check each of the acknowledgement boxes, then add an **Acknowledgement Note**.
- Click **Submit for Approval** at the top or bottom of the screen.

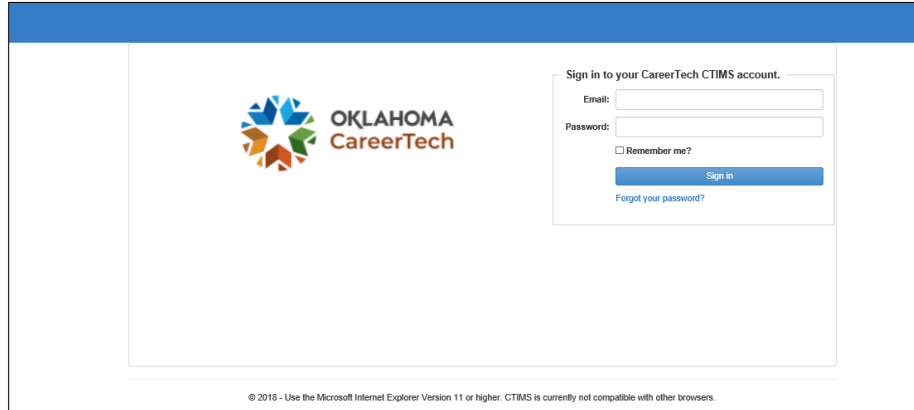
The screenshot shows the 'FLA Grant Submit Worksheet - Step 3' interface. On the left, a sidebar lists sections: Provider Organization Details, Basic Client Information, Project Details, Budget Line Items, Attachments, and Acknowledgements. The 'Acknowledgements' section is expanded and circled in orange. The main area contains three checkboxes for acknowledgements, each followed by a brief description. Below these is a text field for 'Acknowledgement Note:'. At the bottom right, there is a 'Submit For Approval' button, which is also circled in orange with an arrow pointing to it. Navigation buttons like 'Refresh', 'Worksheet Summary', 'Worksheet Contract', 'One Step Back', 'Save as Draft', and 'Submit For Approval' are visible at the top and bottom of the main content area.




- The worksheet will go to the FLA Local Finance Coordinator approval stage.

## FLA Local Finance Coordinator

### Accessing the Worksheet

- Sign in at <https://ctims.okcareertech.org/CTBDSWeb/> using your school email and CTIMS password.



**IMPORTANT:** Please log into CTIMS using Mozilla Firefox , Google Chrome , or the latest version of Microsoft Edge  browsers.

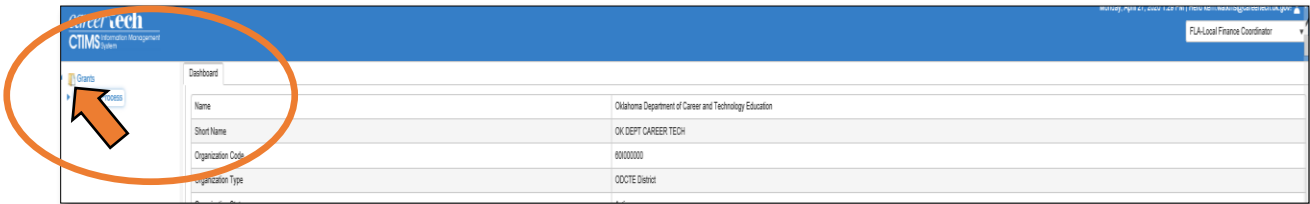
- Verify that you are signed in with the role of **FLA Local Finance Coordinator**. In the top right corner. Use the drop-down arrow to select this role.



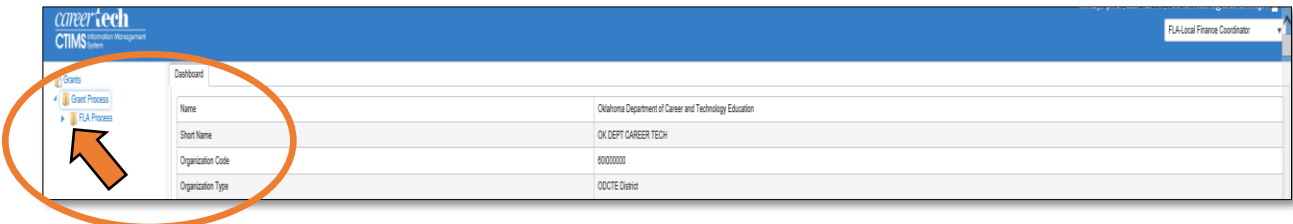
- Click the arrow ► next to **Grants** on left navigation.



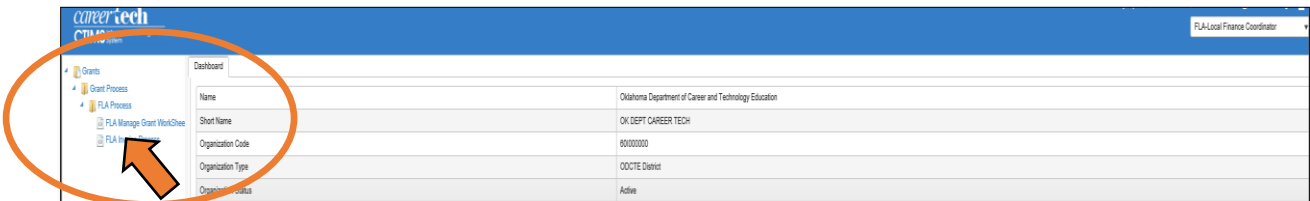
- Click the arrow ► next to **Grants Process** on left navigation.



- Click the arrow ► next to **FLA Process** on left navigation



- Select **Manage Grant Worksheet/Agreements/Invoice/Follow-up** on the left navigation.



## FLA Grant Fund Worksheets List

Complete the **FLA Grant Fund Worksheet List** form. **The tagged numbers on the screen shot correspond to the instruction steps below.** Many of these fields will automatically display based on your organization login credentials. Verify that all the information is correct for your school.

**NOTE:** The red asterisks\* on the form represents a required field.

1. Verify the **Fiscal Calendar Year**.
2. Verify the **Grant Fund Type**.
3. Select an **Organization Type** from the drop-down menu if it does not automatically appear.
4. Select an **Organization** from the dropdown menu. Type the first three letters of your school or organization name and select it from the drop-down menu.
5. Select the **Organization District**. Type the first three letters of your district name and select it from the drop-down menu.
6. Select the **Program Initiative** from the drop-down menu.
7. After verifying that all information is correct, click the **Search** button.

The screenshot shows the 'FLA Grant Fund Worksheets List' form. Fields are numbered 1 through 7, corresponding to the instructions. Field 1 is 'Fiscal Calendar Year' (2019-2020). Field 2 is 'Grant Fund Type' (FLA). Field 3 is 'Organization Type' (College District). Field 4 is 'Organization' (with a hint to enter the first three characters). Field 5 is 'Organization District'. Field 6 is 'Program Initiative' (-Select-). Field 7 is the 'Search' button. Below the form are buttons for 'Save changes', 'Cancel changes', and 'Export to Excel'.

- From the list, choose the worksheet to approve. Click on the **Worksheet Number** in the Worksheet column.

This screenshot shows the same form as above, but with the 'Search' button clicked. The form now displays a list of worksheets. An orange circle and arrow highlight the 'Worksheet Number' column in the table. The table has columns for 'Add', 'Provider Name', 'Client Name', 'Worksheet Approval Current Stage', 'Worksheet Submission Date', 'Worksheet', 'Agreement', 'Agreement Approval Current Stage', 'Worksheet Approval Status', 'Agreement Submission Date', 'Agreement Approval Status', 'BAP Process', and 'Sub Award Allocation'. The first row shows a worksheet for 'Sample Technology Center' with a submission date of 7/24/2019 and a worksheet number of WS-1920-FLA-FLA-OPTCTW-426-16X111745-C103.

## FLA Grant Submit Worksheet – Step 2

- On the FLA Grant Submit Worksheet – Step 2 screen, click **Next Step**.

Dashboard | FLA Manage Grant Worksheets/Agreements/Invoice/Follow-up | WS-1020-FLA-FLA-CPTCTW-428-10X11745-C1022EFD8689 - Fully Approved Stage X

### FLA Grant Submit Worksheet - Step 2

Provider Organization Details

Basic Client Information

Funding Request Details

Welcome to the Carl Perkins Technology Centers that Work Supplemental Grant Application. Please follow all directions to complete the application process; submission of a grant application is not a guarantee of funding.

The Oklahoma Department of CareerTech commits to jointly pursue with the applicant for funding the improvement of performance for all students. To reach this goal, the undersigned parties have reviewed requirements below and accept it as the basis for working together toward the common purpose to fully implement the Oklahoma Technology Centers that Work Network Goals. This agreement is renewed annually and both parties agree to the following items.

DEMONSTRATION SITE AGREES TO:

- On the FLA Grant Submit Worksheet - Step 3 screen, review the budget line items, then click **Submit for Approval** on the top or bottom of the screen.

Dashboard | FLA Manage Grant Worksheets/Agreements/Invoice/Follow-up | WS-1020-FLA-FLA-CPTCTW-428-10X11745-70ACA85858D - Fully Approved Stage X

### FLA Grant Submit Worksheet - Step 3

Provider Organization Details

Basic Client Information

Project Details

Budget Line Items

Grant Allocation	Worksheet Budgeted	Agreement Budgeted	Fully Approved Invoiced	Agreement Unbudgeted = (Allocated - Agmt. Budgeted)	Remaining to Invoice
Sub Award Allocation	\$152,232.00	\$152,120.78	\$148,800.77	\$111.22	\$3,200.01

+ Add Budget Line | X Remove Budget Line | Cancel Budget Line Changes

Budget Line Desc	Req. Units	Req. Unit Cost	Req. Unit Type	Worksheet Total	Req. Total	Status
CPS - 423 - Ag - DEWALT 13-in 15-Amp Dual Bevel Sliding Compound Mit...	1.00	\$999.00	Cost Per Each	\$999.00	\$999.00	Active
CPS - 423 - Ag - DEWALT 32-1/2 in. x 80 in. Rolling Mitre Saw Stand	1.00	\$249.00	Cost Per Each	\$249.00	\$249.00	Active
CPS - 423 - Ag - 7 in. x 12 in. Metal Cutting Band Saw RS-712H	1.00	\$1,245.00	Cost Per Each	\$1,245.00	\$1,245.00	Active
CPS - 423 - Ag - 5 Auto-Clawing Classic Series, Black Miller Welding Hos...	5.00	\$95.00	Cost Per Each	\$475.00	\$475.00	Active
PePS - 423 - BITE - O Suite Management License	22.00	\$25.00	Cost Per Each	\$550.00	\$550.00	Active
PePS - 423 - BITE - MAC Laptop	1.00	\$1,300.00	Cost Per Each	\$1,300.00	\$1,300.00	Active
MTG - 423 - GUID - CPC Salary (32.8% Federal)	1.00	\$19,520.81	Cost Per Each	\$19,520.81	\$19,520.81	Active
MTG - 423 - GUID - CPC Benefits (33.8% Federal)	1.00	\$6,788.15	Cost Per Each	\$6,788.15	\$6,788.15	Active
MTG - 423 - Scissor Rack with Lift Kit	1.00	\$36,456.16	Cost Per Each	\$36,456.16	\$36,456.16	Active
MTG - 423 - Scissor Rack accessories Alignment System, air, light	1.00	\$20,590.25	Cost Per Each	\$20,590.25	\$20,590.25	Active
MPS - 423 - AG - Del Chromebooks	11.00	\$392.23	Cost Per Each	\$4,314.53	\$4,314.53	Active
MPS - 423 - AG - Travel Whiteboard	1.00	\$2,250.00	Cost Per Each	\$2,250.00	\$2,250.00	Active
SPS - 423 - ENG - VS Starter Bundle	3.00	\$3,599.00	Cost Per Each	\$10,797.00	\$10,797.00	Active
<b>TOTAL</b>	<b>57.00</b>	<b>\$148,800.77</b>	<b>Cost Per Each</b>	<b>\$148,800.77</b>	<b>\$148,800.77</b>	<b>Active</b>

Note:

Maximum 1000 characters length

Attachments

Acknowledgements

This record is fully approved, you are not authorized to change data within this record

- The Worksheet will go to the FLA Local Superintendent for approval.

**FLA Local Superintendent/President**

- Follow the instructions for FLA Local Finance Coordinator to approve the FLA Worksheet.
- The Worksheet will go to the FLA State Initiative Coordinator for approval.

**FLA State Initiative Coordinator**

- Follow the instructions for FLA Local Finance Coordinator to approve the FLA Worksheet.
- The Worksheet will go to the FLA State FLA State Initiative Supervisor for approval.

**FLA State Initiative Supervisor**

- Follow the instructions for FLA Local Finance Coordinator to approve the FLA Worksheet.
- The Worksheet will go to the FLA State ODCTE Contract Reviewer for approval.

**ODCTE Contract Reviewer**

- This is the final approval stage for the FLA Worksheet.

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# Agreement Process


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## Agreement Process Flow

The following roles represent the stages required in CTIMS for the submission of an Agreement.

**Stage 1 - FLA Local Finance Coordinator** – Creates, completes, saves and submits agreement.

  
**Stage 2 - FLA State Initiative Coordinator**– 1<sup>st</sup> Approval. Reviews and approves or rejects agreement. If approved, goes to next stage. If rejected, goes back to stage 1

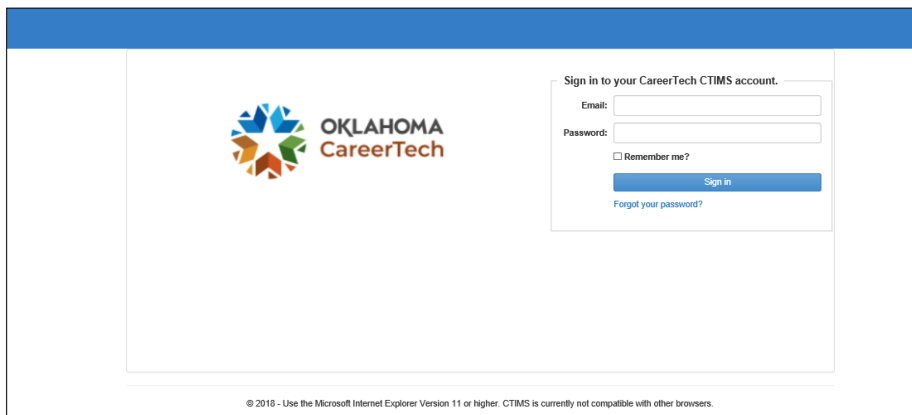
  
**Stage 3 - FLA State Supervisor** – 2<sup>nd</sup> Approval. Reviews and approves or rejects agreement. If approved, goes to State approval stage. If rejected, goes back to stage 1.





## FLA Local Finance Coordinator

### Accessing the Agreement

- Sign in at <https://ctims.okcareertech.org/CTBDSWeb/> using your school email and CTIMS password.



**IMPORTANT:** Please log into CTIMS using Mozilla Firefox , Google Chrome , or the latest version of Microsoft Edge  browsers.

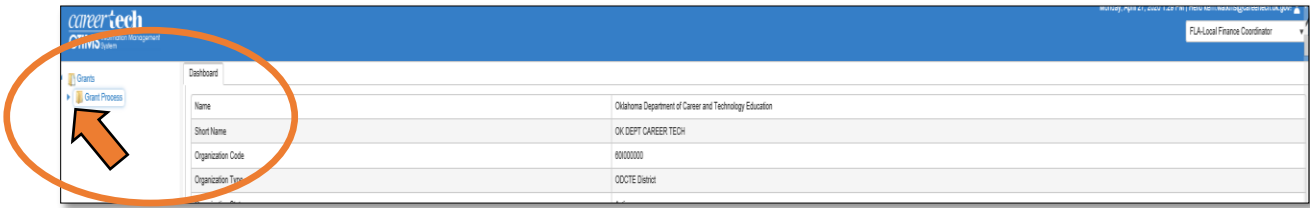
- Verify that you are signed in with the role of **FLA Local Finance Coordinator**. In the top right corner. Use the drop-down arrow to select this role.



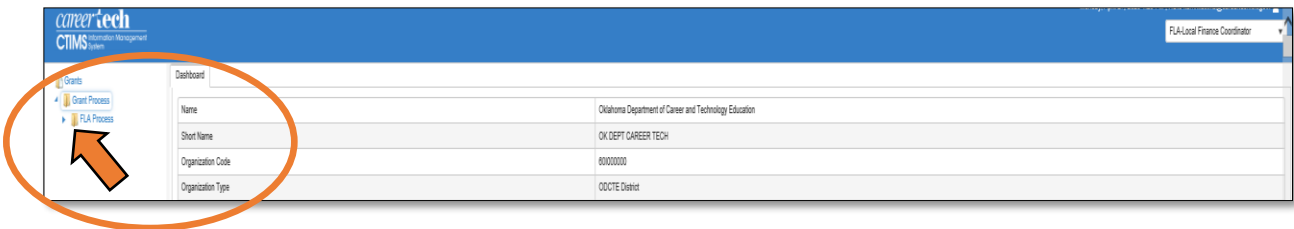
- Click the arrow |▶ next to **Grants** on left navigation.



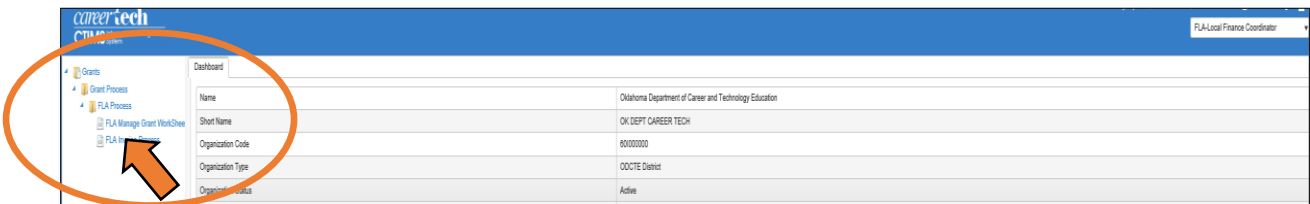
- Click the arrow ► next to **Grants Process** on left navigation.



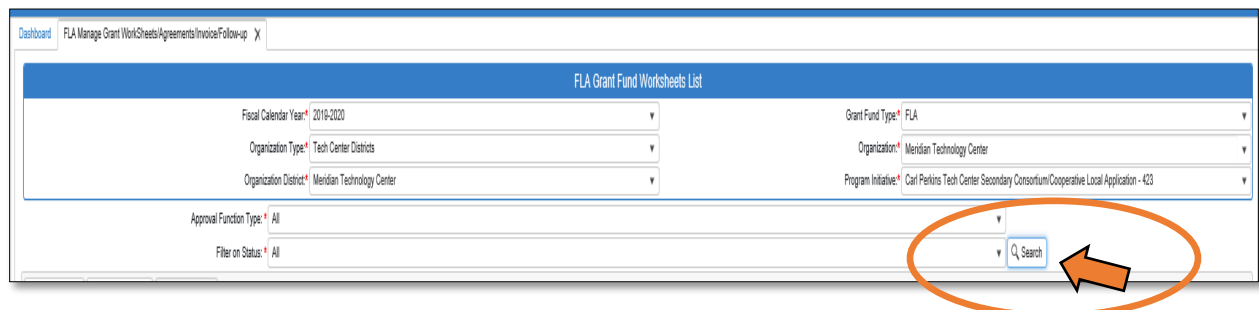
- Click the arrow ► next to **FLA Process** on left navigation



- Select **Manage Grant Worksheet/Agreements/Invoice/Follow-up** on the left navigation.



- On the **FLA Grant Fund Worksheet List** screen, choose the **Organization Type**, **Organization** (type in the first 3 letters of your organization), and the **Program Initiative**.
- Then, click **Search**.



- In the **Agreement** column, click **New** to create the new agreement.

The screenshot shows the 'FLA Grant Fund Worksheets List' interface. At the top, there are filters for Fiscal Calendar Year (2019-2020), Organization Type (Tech Center Districts), Organization District (Meridian Technology Center), Grant Fund Type (FLA), Organization (Meridian Technology Center), and Program Initiative (Carl Perkins Tech Center Secondary Consortium/Cooperative Local Application - 423). Below these are buttons for 'Save changes', 'Cancel changes', and 'Export to Excel'. The main table has columns for 'Add', 'Provider Name', 'Client Name', 'Worksheet Approval Current Stage', 'Worksheet Submission Date', 'Worksheet', 'Agreement', 'Agreement Approval Current Stage', 'Worksheet Approval Status', 'Agreement Submission Date', 'Agreement Approved Status', 'BAP Process', and 'Sub Award Allocation'. The first row is highlighted, and the 'Agreement' column contains the text 'New', which is circled in orange with an arrow pointing to it.

## FLA Grant Agreement

For each budget line item, enter the OCAS code. OCAS codes are in the following format: Program-Function-Object Code (e.g. 330-1000-100). For a list of codes and descriptions, go to <https://www.okcareertech.org/about/state-agency/divisions/imd/ctims/OCASCodesforBIS.xlsx>.

- On each budget line item, enter the OCAS coding. In each field under the OCAS code column, begin typing the code, then select from the drop-down.

The screenshot shows the 'FLA Grant Agreement' interface. It includes sections for 'Provider Organization Details', 'Basic Client Information', 'Project Details', and 'Budget Line Items'. The 'Budget Line Items' section contains a table with columns: 'Budget Line (OCAS CODE)', 'Agreement Line Item', 'Units', 'Unit Cost', 'Req. Unit Type', 'Total', 'Approv. Total', 'Status', 'Budget Line Desc.', 'Req. Unit Type', 'Req. Units', 'Req. Unit Cost', 'Work Sheet Req. Total', 'Work Sheet Total', 'Allocated', 'Avl. to Invoice', 'Approved Invoice Amt.', and 'Inv. Pending Amt.'. The first row of the table is highlighted, and the 'Budget Line (OCAS CODE)' column is circled in orange with an arrow pointing to it.

- After entering OCAS codes for each line item, click **Save as Draft**.
- Add a note in the notes field if necessary.

Dashboard FLA Manage Grant Worksheets/Agreements/Invoice Follow-up Y5A0-1025-FLA-FLA-CPTC-423-10X111745-EDC277FCEB8 - Fully Approved Stage X

### FLA Grant Agreement

Provider Organization Details [Refresh](#) [BA Detail Report](#) [Agreement Summary](#) [Save as Draft](#) [Submit For Approval](#)

Basic Client Information

Project Details

Budget Line Items

Grant Allocation

Sub Award Allocation	Worksheet Budgeted	Agreement Budgeted	Fully Approved Invoiced	Agreement Unbudgeted + (Allocated - Agmt. Budgeted)	Remaining to Invoice
\$152,232.00	\$148,079.80	\$152,120.78	\$148,820.77	\$111.22	\$3,200.01

Budget Line(s) Budget Line Detail Information

+ Add Budget Line -X Remove Budget Line - Cancel Budget Line Changes

Budget Line(OCAS CODE)	Function - Object - Program	Agreement Line Desc.	Units	Unit Cost	Req. Unit Type	Total	Approved Total	Status	Budget Line Desc.	Req. Unit Type	Req. Units	Req. Unit Cost	Work Sheet Req. Total	Work Sheet Total	Allocated	Ad. to Invoice	Approved Invoice Amt.	Inv. Pending
1000-000-332	CPS - 423 - Ag. DEWALT 12-in 15-Amp Dr...		1	\$302.27 Cost Per Each		\$302.27	\$302.27	Active	CPS - 423 - Ag. Each		1	\$302.27	\$302.27	\$302.27	\$0.00	\$302.27	\$0.00	
1000-000-332	CPS - 423 - Ag. DEWALT 32-12 in x 60 L...		1	\$190.00 Cost Per Each		\$190.00	\$190.00	Active	CPS - 423 - Ag. Each		1	\$249.00	\$249.00	\$249.00	\$190.00	\$0.00	\$190.00	\$0.00

Dashboard FLA Manage Grant Worksheets/Agreements/Invoice Follow-up Y5A0-1025-FLA-FLA-CPTC-423-10X111745-EDC277FCEB8 - Fully Approved Stage X

### FLA Grant Agreement

Provider Organization Details [Refresh](#) [BA Detail Report](#) [Agreement Summary](#) [Save as Draft](#) [Submit For Approval](#)

Basic Client Information

Project Details

Budget Line Items

Grant Allocation

Sub Award Allocation	Worksheet Budgeted	Agreement Budgeted	Fully Approved Invoiced	Agreement Unbudgeted + (Allocated - Agmt. Budgeted)	Remaining to Invoice
\$152,232.00	\$148,079.80	\$152,120.78	\$148,820.77	\$111.22	\$3,200.01

Budget Line(s) Budget Line Detail Information

+ Add Budget Line -X Remove Budget Line - Cancel Budget Line Changes

Budget Line(OCAS CODE)	Function - Object - Program	Agreement Line Desc.	Units	Unit Cost	Req. Unit Type	Total	Approved Total	Status	Budget Line Desc.	Req. Unit Type	Req. Units	Req. Unit Cost	Work Sheet Req. Total	Work Sheet Total	Allocated	Ad. to Invoice	Approved Invoice Amt.	Inv. Pending
1000-000-332	CPS - 423 - Ag. DEWALT 12-in 15-Amp Dr...		1	\$302.27 Cost Per Each		\$302.27	\$302.27	Active	CPS - 423 - Ag. Each		1	\$302.27	\$302.27	\$302.27	\$0.00	\$302.27	\$0.00	
1000-000-332	CPS - 423 - Ag. DEWALT 32-12 in x 60 L...		1	\$190.00 Cost Per Each		\$190.00	\$190.00	Active	CPS - 423 - Ag. Each		1	\$249.00	\$249.00	\$249.00	\$190.00	\$0.00	\$190.00	\$0.00
1000-000-332	CPS - 423 - Ag. 8-Amp Cordless Drills...		8	\$442.50 Cost Per Each		\$3,540.00	\$3,540.00	Active	CPS - 423 - Ag. Each		8	\$442.50	\$3,540.00	\$3,540.00	\$0.00	\$0.00	\$3,540.00	\$0.00
1000-000-330	PMPS - 423 - BITE - 15 Sub Management...		22	\$225.00 Cost Per Each		\$4,950.00	\$4,950.00	Active	PMPS - 423 - B. Each		22	\$225.00	\$4,950.00	\$4,950.00	\$0.00	\$0.00	\$4,950.00	\$0.00
1000-000-332	PMPS - 423 - BITE - MAC Laptop		1	\$1,190.00 Cost Per Each		\$1,190.00	\$1,190.00	Active	PMPS - 423 - B. Each		1	\$1,190.00	\$1,190.00	\$1,190.00	\$0.00	\$0.00	\$1,190.00	\$0.00
2100-100-334	MTG - 423 - GUID - CPC Salary (32.0% F...		1	\$19,520.81 Cost Per Each		\$19,520.81	\$19,520.81	Active	MTG - 423 - G. Each		1	\$19,520.81	\$19,520.81	\$19,520.81	\$0.00	\$0.00	\$19,520.81	\$0.00
2100-200-334	MTG - 423 - GUID - CPC Benefits (33.0% F...		1	\$6,788.15 Cost Per Each		\$6,788.15	\$6,788.15	Active	MTG - 423 - G. Each		1	\$6,788.15	\$6,788.15	\$6,788.15	\$0.00	\$0.00	\$6,788.15	\$0.00
1000-700-332	MTG - 423 - Sessor Pack with LR 108		1	\$31,516.07 Cost Per Each		\$31,516.07	\$31,516.07	Active	MTG - 423 - S. Each		1	\$31,516.07	\$31,516.07	\$31,516.07	\$0.00	\$0.00	\$31,516.07	\$0.00
1000-700-332	MTG - 423 - Sessor Pack accessories Alg...		1	\$28,059.21 Cost Per Each		\$28,059.21	\$28,059.21	Active	MTG - 423 - S. Each		1	\$28,059.21	\$28,059.21	\$28,059.21	\$0.00	\$0.00	\$28,059.21	\$0.00
1000-000-332	WPS - 423 - AG - Dell Chromebooks		11	\$332.23 Cost Per Each		\$3,654.53	\$3,654.53	Active	WPS - 423 - A. Each		11	\$332.23	\$3,654.53	\$3,654.53	\$0.00	\$0.00	\$3,654.53	\$0.00
						\$152,120.78	\$152,120.78								\$152,120.78	\$3,200.01	\$148,920.77	\$0.00

Notes

Corrected OCAS Coding  
Adjusted budget according to invoice  
Items were changed out per school's request  
Corrected Description of line items  
Maximum 1000 characters length

Attachments

Acknowledgements

- Click **Acknowledgements** and check the certify box(es).

The screenshot shows the 'FLA Grant Agreement' form in the CareerTech CTIMS system. The 'Acknowledgements' section is highlighted with an orange arrow. The form includes fields for Provider Organization Details, Basic Client Information, Project Details, Budget Line Items, Attachments, and Acknowledgements. The Acknowledgements section contains a checkbox for 'I certify to the best of my knowledge that the submitted agreement budget is complete, and accurate, and that the expenditures fall within the intent of the Federal Carl Perkins Act.' and a text area for 'Acknowledgement Note'.

- Add an acknowledgment note, as this is required.
- Then, click **Submit for Approval**.

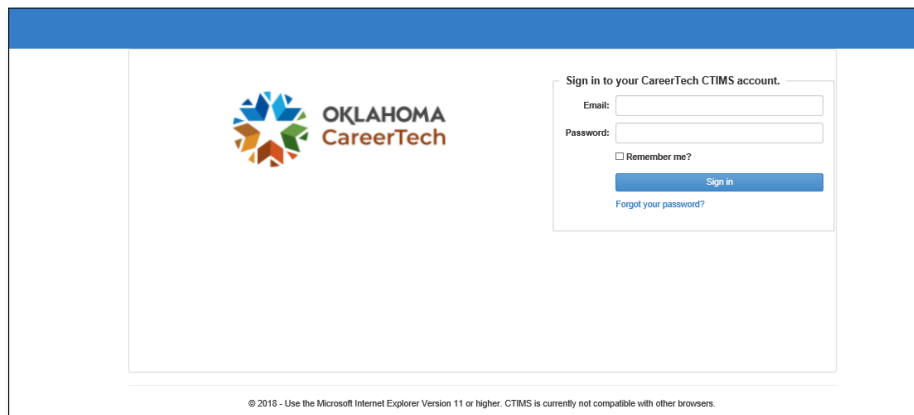
The screenshot shows the 'FLA Grant Agreement' form in the CareerTech CTIMS system. The 'Acknowledgement Note' field is highlighted with an orange arrow. The 'Submit for Approval' button is highlighted with an orange circle and an orange arrow.



- The Agreement will go to the **FLA State Initiative Coordinator** for approval.

## FLA State Initiative Coordinator

### Accessing the Agreement

- Sign in at <https://ctims.okcareertech.org/CTBDSWeb/> using your school email and CTIMS password.

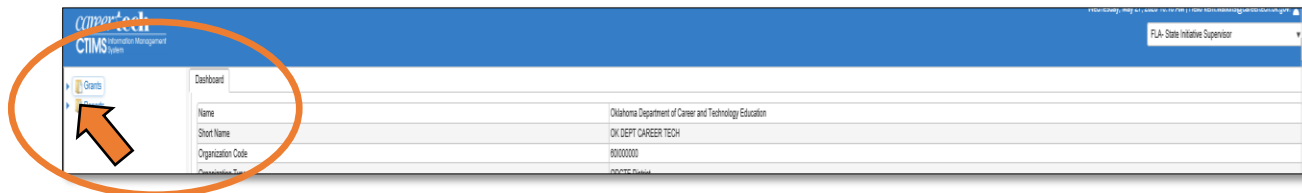


**IMPORTANT:** Please log into CTIMS using Mozilla Firefox , Google Chrome , or the latest version of Microsoft Edge  browsers.

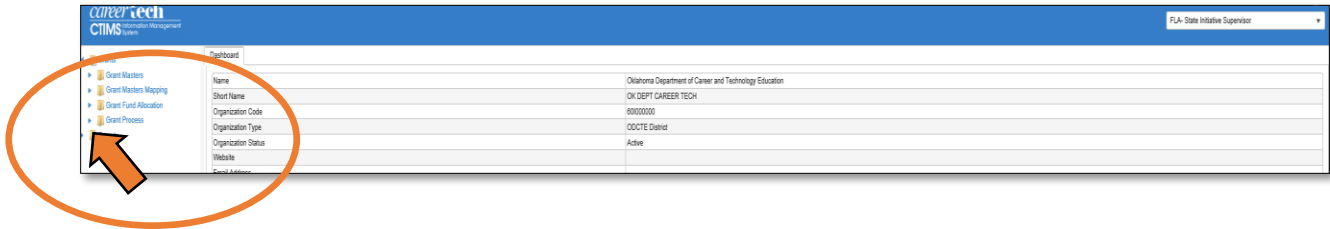
- Verify that you are signed in with the role of **FLA State Initiative Coordinator**. In the top right corner. Use the drop-down arrow to select this role.



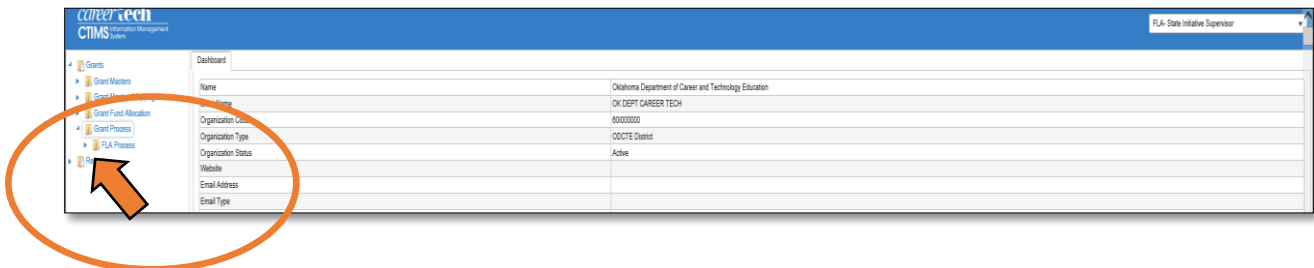
- Click the arrow next to **Grants** on left navigation.



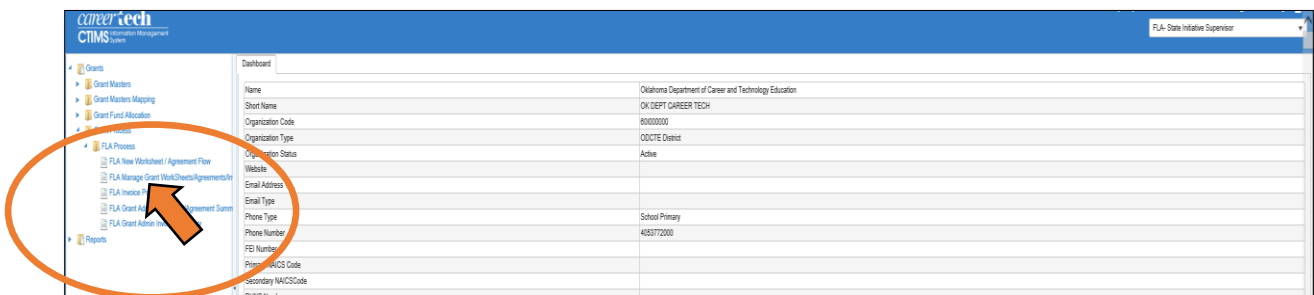
- Click the arrow ► next to **Grants Process** on left navigation.



- Click the arrow ► next to **FLA Process** on left navigation.



- Select **Manage Grant Worksheet/Agreements/Invoice/Follow-up** on the left navigation.



- On the **FLA Grant Fund Worksheet List** screen, choose the **Organization Type**, **Organization** (type in the first 3 letters of your organization), and the **Program Initiative**.
- Then, click **Search**.

FLA Grant Fund Worksheets List

Fiscal Calendar Year: 2019-2020  
 Organization Type: Tech Center Districts  
 Organization: Meridian Technology Center

Grant Fund Type: FLA  
 Organization: Meridian Technology Center  
 Program Initiative: Carl Perkins Tech Center Secondary Consortium/Cooperative Local Application - 423

Approval Function Type: All  
 Filter on Status: All

Search

- In the **Agreement** column, click the **Agreement Number**.

FLA Grant Fund Worksheets List

Fiscal Calendar Year: 2019-2020  
 Organization Type: Tech Center Districts  
 Organization: Meridian Technology Center

Grant Fund Type: FLA  
 Organization: Meridian Technology Center  
 Program Initiative: Carl Perkins Tech Center Secondary Consortium/Cooperative Local Application - 423

Approval Function Type: All  
 Filter on Status: All

Save changes Cancel changes Export to Excel

Act	Provider Name	Client Name	Worksheet Approval Current Stage	Worksheet Submission Date	Worksheet	Agreement	Agreement Approval Current Stage	Worksheet Approved Status	Agreement Submission Date	Agreement Approved Status	BAP Process	Sub Award Allocation
	Meridian Technology Center	MERIDIAN TECH CENTER DIST...	This stage is approving for Contra...	05/09/2019 15...	WS-1825-FLA-FLA-CPTCS-423-111745-78ACA...	WSAG-1825-FLA-FLA-CPTCS-423-111745-8DC...	State Supervisor - Fully Approved...	Fully Approved	09/25/2019 08...	Fully Approved	No	\$152,232.00

- Review the budget line items.
- Approve by clicking **Submit for Approval**.
- The agreement will go to the **FLA State Supervisor** approval stage.

**NOTE:** If the agreement needs to be rejected, click **Reject** and add a rejection note. The agreement will go back to the FLA Local Finance Coordinator.



## FLA State Initiative Supervisor

- Follow the instructions for FLA State Initiative Coordinator to approve the FLA Agreement.
- This is the final approval stage for the FLA Agreement.

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# Invoice Process

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## Invoice Process Flow

The following roles represent the stages required in CTIMS for the submission of a New Worksheet (Application).

**Stage 1 - FLA Local Finance Coordinator** – Creates, completes, saves and submits new invoice.



**Stage 2 - FLA State Initiative Coordinator** – Reviews and approves or rejects invoice. If approved, goes to next stage. If rejected, goes back to stage 1.



**Stage 3 - FLA State Initiative Supervisor** – Reviews and approves or rejects worksheet. If approved, goes to State approval stage. If rejected, goes back to stage 1.



**Stage 4 - ODCTE Finance Document Coordinator** - ODCTE state staff reviews and approves or rejects worksheet. If approved, goes to final approval stage. If rejected, goes back to stage 1.

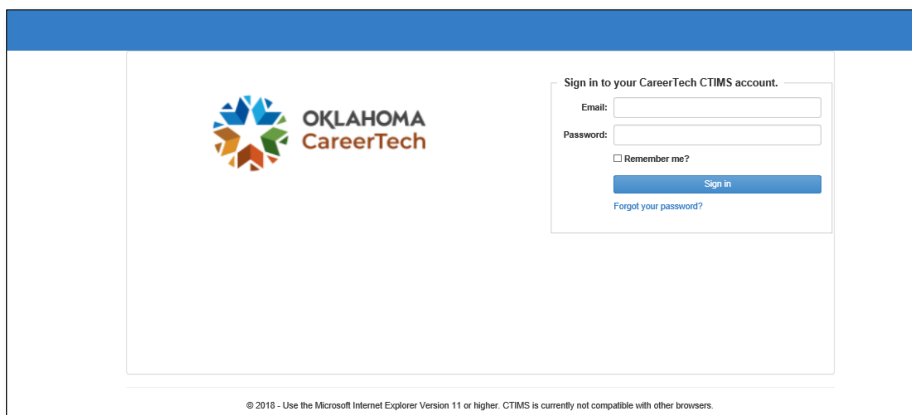





**Stage 5 - ODCTE Finance Reviewer** – ODCTE State Supervisor approves or rejects the worksheet. If approved goes to the final approval stage.

## FLA Local Finance Coordinator

### Accessing the Invoice


- Sign in at <https://ctims.okcareertech.org/CTBDSWeb/> using your school email and CTIMS password.

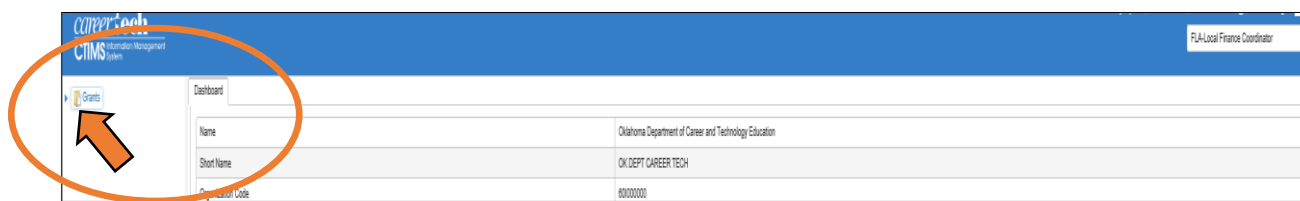


**IMPORTANT:** Please log into CTIMS using Mozilla Firefox , Google Chrome , or the latest version of Microsoft Edge  browsers.

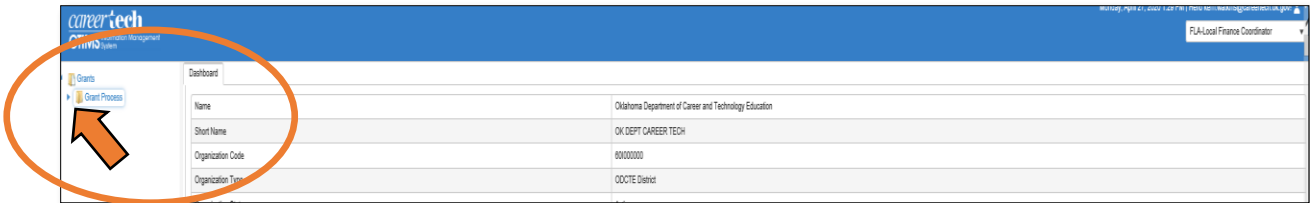
- Verify that you are signed in with the role of **FLA Local Finance Coordinator**. In the top right corner. Use the drop-down arrow to select this role.



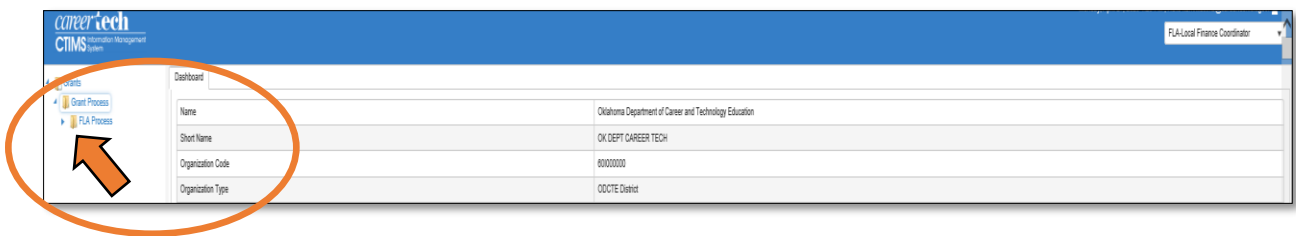
- Click the arrow  next to **Grants** on left navigation.



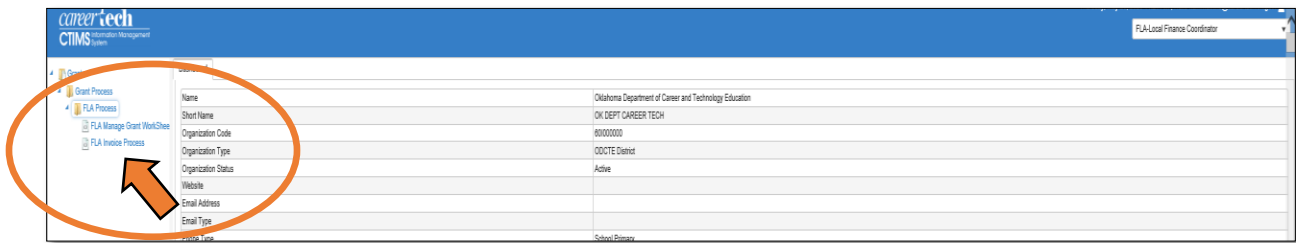
- Click the arrow ► next to **Grants Process** on left navigation.



- Click the arrow ► next to **FLA Process**



- Select **FLA Invoice Process** on the left navigation.



- Complete the requested information on the **FLA Grant Fund Invoices List** screen.

**NOTE:** The asterisks\* represents a required field.

1. Verify **Fiscal Calendar Year**
2. Verify **Grant Fund Type**
3. Select the **Organization Type** from the drop down menu
4. Select your **Organization** by typing in the first three characters of the name
5. Verify the **Organization District**
6. Select a **Program Initiative**
7. **Approval Function Type** will remain as **All**
8. **Filter on Status** will remain as **All**
9. Click **Search**

- On the **FLA Grant Invoices List**, select **New Invoice** to start the invoice process (not the arrow).

**NOTE:** To see the status of an invoice that has already submitted, click the arrow.

## Revising/Submitting the Invoice

- On the **FLA Grant Submit Invoice – Step 1** screen, click **Save & Next**.

The screenshot shows the 'FLA Grant Submit Invoice - Step 1' screen. The 'Save & Next' button is located at the bottom right of the form, circled in orange with an arrow pointing to it.

- On the **FLA Grant Submit Invoice - Step 2** screen, check the box(es) next to the line item you need to invoice.

The screenshot shows the 'FLA Grant Submit Invoice - Step 2' screen. An orange arrow points to the checkbox next to the first line item, 'SPS - 423 - AG - 2 Hwa Hwa Set'.

Agreement Line Desc.	Budget Line/OCAS CODE	Function - Object - Program	OCAS Description	Units	Unit Cost	Req. Unit Type	Total	Approve Total	Aut. to Invoice	Current Line Invoiced	Total Invoiced	Worksheet Budget Line Desc.
<input type="checkbox"/> SPS - 423 - AG - 2 Hwa Hwa Set	1000-400-332	1000-Supplies-800-Supplies-332-Instruction		2.00	\$1,259.38	Cost Per Each	\$2,518.76	\$2,518.76	\$0.01	\$0.00	\$2,518.76	SPS - 423 - AG - 2 Hwa Hwa Set
<input type="checkbox"/> SPS - 423 - ENG - Impulse G3 Race Sy...	1000-400-332	1000-Supplies-800-Supplies-332-Instruction		1.00	\$1,500.00	Cost Per Each	\$1,500.00	\$1,500.00	\$1,500.00	\$0.00	\$0.00	Impulse G3 Race System BAP
<input type="checkbox"/> PEP - 423 - PHM - Phantom 4 Pro V2.0	1000-400-332	1000-Supplies-800-Supplies-332-Instruction		1.00	\$1,700.00	Cost Per Each	\$1,700.00	\$1,700.00	\$1,700.00	\$0.00	\$0.00	PeP5 - 423 - Phantom 4 Pro V2.0 BAP
							\$5,718.76	\$5,718.76	\$3,200.01	\$0.00	\$2,518.75	

- If you need to make a change to the line item, click on the arrow next to the line to expand the details and click the **Edit** button.

Dashboard FLA Invoice Process X New Invoice X

FLA Grant Submit Invoice - Step 2

Provider Organization Details

Basic Client Information

Project Details

Grant Allocation

Invoice Line Items

Agreement Line Desc.	Budget Line(OAS CODE) Function - Object - Program	OAS Description	Units	Unit Cost	Req. Unit Type	Total	Approve Total	Aut. to Invoice	Current Line Invoiced	Total Invoiced	Worksheet Budget Line Desc.
SPS - 423 - AG - 2 Hix Hives Set	1000-800-332	1000-Supplies-800-Supplies-332-Instruction	2.00	\$1,256.38	Cost Per Each	\$2,518.76	\$2,518.76	\$0.01	\$0.00	\$2,518.76	SPS - 423 - AG - 2 Hix Hives Set

+ Add Invoice

Is Active	Invoice Line Desc.	Budget Line(OAS CODE) Function - Object - Program	Units	Unit Cost	Req. Unit Type	Total	Total To Be Invoiced	Date Of Expense	Serial Number	Local Reference
Active	SPS - 423 - AG - 2 Hix Hives Set	1000-800-332	1.00	\$0.01	Cost Per Each	\$0.01	\$0.01			

✎ Edit

- Once the changes have been made, click **Update**.

Grant Allocation

Invoice Line Items

Agreement Line Desc.	Budget Line(OAS CODE) Function - Object - Program	OAS Description	Units	Unit Cost	Req. Unit Type	Total	Approve Total	Aut. to Invoice	Current Line Invoiced	Total Invoiced	Worksheet Budget Line Desc.
SPS - 423 - AG - 2 Hix Hives Set	1000-800-332	1000-Supplies-800-Supplies-332-Instruction	2.00	\$1,256.38	Cost Per Each	\$2,518.76	\$2,518.76	\$0.00	\$0.01	\$2,518.76	SPS - 423 - AG - 2 Hix Hives Set

+ Add Invoice

Is Active	Invoice Line Desc.	Budget Line(OAS CODE) Function - Object - Program	Units	Unit Cost	Req. Unit Type	Total	Total To Be Invoiced	Date Of Expense	Serial Number	Local Reference
Active	SPS - 423 - AG - 2 Hix Hives Set	1000-800-332	1.00	\$0.01	Cost Per Each	\$0.01	\$0.01			

✓ Update Cancel

Agreement Line Desc.	Budget Line(OAS CODE) Function - Object - Program	OAS Description	Units	Unit Cost	Req. Unit Type	Total	Approve Total	Aut. to Invoice	Current Line Invoiced	Total Invoiced	Worksheet Budget Line Desc.
SPS - 423 - ENG - Implode G3 Race Sy.	1000-800-332	1000-Supplies-800-Supplies-332-Instruction	1.00	\$1,500.00	Cost Per Each	\$1,500.00	\$1,500.00	\$1,500.00	\$0.00	\$0.00	Implode G3 Race System BAP
B-DE - 475 - ITEM - B-DE - 475 - 1000-800-332	1000-800-332	1000-Supplies-800-Supplies-332-Instruction	1.00	\$1,700.00	Cost Per Each	\$1,700.00	\$1,700.00	\$1,700.00	\$0.00	\$0.00	B-DE - 475 - 1000-800-332
						\$5,718.76	\$5,718.76	\$3,200.00	\$0.01	\$2,518.76	

Attachments

Acknowledgements

Refresh Invoice Summary One Step Back Save as Draft Submit For Approval



- After the changes have been made and the line items to invoice have been checked, click the **Save as Draft** button at the top or bottom of the screen if you are not ready to submit for approval. This will allow you to access the invoice at a later time to make additional changes if necessary.

FLA Grant Submit Invoice - Step 2

Provider Organization Details

Basic Client Information

Project Details

Grant Allocation

Invoice Line Items

Agreement Line Desc.	Budget Line/OCAS CODE	Function - Object - Program	OCAS Description	Units	Unit Cost	Req. Unit Type	Total	Approv Total	Amt. to Invoice	Current Line Invoiced	Total Invoiced	Worksheet Budget Line Desc.
SPS - 423 - AG - 2 Hex Hives Set	1000-600-332		1000-Supplies-600-Supplies-332-Instruction	2.00	\$1,259.38	Cost Per Each	\$2,518.76	\$2,518.76	\$0.00	\$0.01	\$2,518.76	SPS - 423 - AG - 2 Hex Hives Set
SPS 423 - ENO - Impulse Q3 Race Sy...	1000-600-332		1000-Supplies-600-Supplies-332-Instruction	1.00	\$1,500.00	Cost Per Each	\$1,500.00	\$1,500.00	\$1,500.00	\$0.00	\$0.00	Impulse Q3 Race System BAP
PaPS - 423 - STEM - Phantom 4 Pro V2.0	1000-600-332		1000-Supplies-600-Supplies-332-Instruction	1.00	\$1,700.00	Cost Per Each	\$1,700.00	\$1,700.00	\$1,700.00	\$0.00	\$0.00	PaPS - 423 - Phantom 4 Pro V2.0 BAP
							\$5,718.76	\$5,718.76	\$3,200.00	\$0.01	\$2,518.76	

Attachments

Acknowledgements

Refresh Invoice Summary One Step Back Save as Draft Submit For Approval

- To add attachments, expand the Attachments section by clicking on the word **Attachment**.

FLA Grant Submit Invoice - Step 2

Provider Organization Details

Basic Client Information

Project Details

Grant Allocation

Invoice Line Items

Agreement Line Desc.	Budget Line/OCAS CODE	Function - Object - Program	OCAS Description	Units	Unit Cost	Req. Unit Type	Total	Approv Total	Amt. to Invoice	Current Line Invoiced	Total Invoiced	Worksheet Budget Line Desc.
SPS - 423 - AG - 2 Hex Hives Set	1000-600-332		1000-Supplies-600-Supplies-332-Instruction	2.00	\$1,259.38	Cost Per Each	\$2,518.76	\$2,518.76	\$0.00	\$0.01	\$2,518.76	SPS - 423 - AG - 2 Hex Hives Set
SPS 423 - ENO - Impulse Q3 Ra...	1000-600-332		1000-Supplies-600-Supplies-332-Instruction	1.00	\$1,500.00	Cost Per Each	\$1,500.00	\$1,500.00	\$1,500.00	\$0.00	\$0.00	Impulse Q3 Race System BAP
PaPS - 423 - STEM - Phantom 4...	1000-600-332		1000-Supplies-600-Supplies-332-Instruction	1.00	\$1,700.00	Cost Per Each	\$1,700.00	\$1,700.00	\$1,700.00	\$0.00	\$0.00	PaPS - 423 - Phantom 4 Pro V2.0...
							\$5,718.76	\$5,718.76	\$3,200.00	\$0.01	\$2,518.76	

Attachments

Acknowledgements

Refresh Invoice Summary One Step Back Save as Draft Submit For Approval

- In the Attachments section, click the **Select Files** button to find the files on your computer.
- When your file is selected, click the **Upload and Save File** button.
- Add an attachment note.

**NOTE:** You can make attached files inactive/active, delete files, or download files by checking the box next to the file name and using the corresponding buttons.

- Expand the Acknowledgement section by clicking on the word **Acknowledgements**.
- Check the appropriate acknowledgement boxes, add the date, and a note in the note field.

Invoice Line Items

Attachments

**Acknowledgements**

☐ By checking this box, I certify to the best of my knowledge and belief that the report is true, complete, and accurate, and the expenditures, disbursements and cash receipts are for the purposes and objectives set forth in the terms and conditions of the Federal award. I am aware that any false, fictitious, or fraudulent information, or the omission of any material fact, may subject me to criminal, civil, or administrative penalties for fraud, false statements, false claims or otherwise. U.S. Code Title 18, Section 1001 and Title 31, Sections 3729-3730 and 3801-3812 2 CFR 200.415(a) (CFR 2015 ed.)

☐ I have attached signed federal direct and summary accounting reports that show proof of payments (OCAS reports for secondary recipients, OCAS or other accounting reports for Technology Centers and colleges. Financial Analysis reports are NOT adequate for payment and will cause the invoice to be rejected)

☐ I have attached LEGIBLE copies of all required vendor invoices if applicable.

Reporting Period: Date Range: MM/DD/YYYY To MM/DD/YYYY \*

Check box if final invoice for reimbursement:

Acknowledgement Note:

**B** *I* U (inherited size) Format

Refresh Invoice Summary One Step Back Save as Draft Submit For Approval

- Finally, click the **Submit for Approval** button.

Dashboard FLA Invoice Process INV-1920-FLA-FLA-OPTDS-423-19X111745-74FD283C73D7

FLA Grant Submit Invoice - Step 2

Provider Organization Details

Basic Client Information

Project Details

Grant Allocation

Invoice Line Items

Agreement Line Desc	Budget Line/OCAS	OCAS Description	Units	Unit Cost	Req. Unit Type	Total	Approve Total	Amt. to Invoice	Current Line Invoiced	Total Invoiced	Worksheet Budget Line Desc
SPS-423-A2-2 New Hives Set	1000-400-332	1000-Supplies-400-Supplies-332-Instruction	2.00	\$1,259.38	Cost Per Each	\$2,518.76	\$2,518.76	\$0.00	\$0.01	\$2,518.76	SPS-423-A2-2 New Hives Set
SPS-423-ENG-Improve G3 Race Sy...	1000-400-332	1000-Supplies-400-Supplies-332-Instruction	1.00	\$1,500.00	Cost Per Each	\$1,500.00	\$1,500.00	\$1,500.00	\$0.00	\$0.00	Improve G3 Race System BAP
PePS-423-STEM-Phantom 4 Pro V2.0	1000-400-332	1000-Supplies-400-Supplies-332-Instruction	1.00	\$1,700.00	Cost Per Each	\$1,700.00	\$1,700.00	\$1,700.00	\$0.00	\$0.00	PePS-423-Phantom 4 Pro V2.0 BAP
						\$5,718.76	\$5,718.76	\$3,200.00	\$0.01	\$2,518.76	

Attachments

Acknowledgements

Refresh Invoice Summary One Step Back Save as Draft Submit For Approval

- On the confirmation pop-up, click **OK**.

FLA Grant Submit Invoice - Step 2

Grant Invoice

Successfully completed the current stage and going to next stage. Please wait...

OK

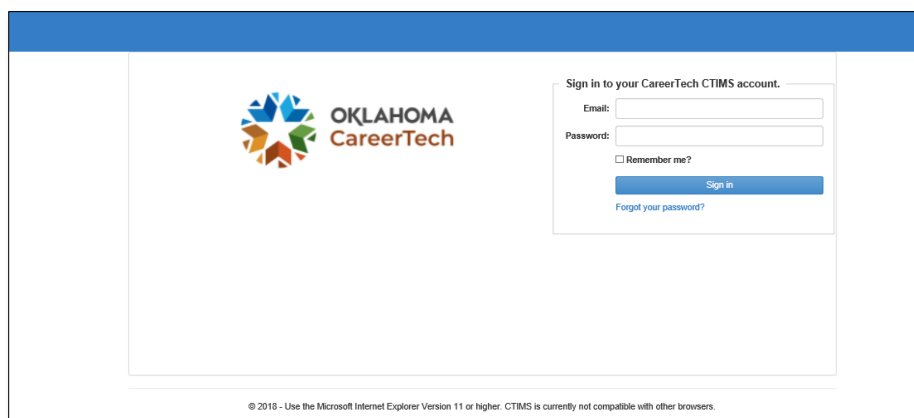
## FLA State Initiative Coordinator




There are two ways to access invoices to review and approve.

### Accessing the Invoice – Option 1

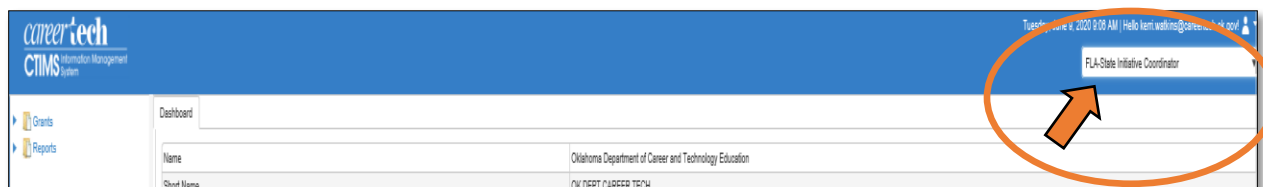
This option allows you to access invoices for a specific organization type and specific organization. (For example; technology center as the type of organization and technology center district as organization).

- Sign in at <https://ctims.okcareertech.org/CTBDSWeb/> using your school email and CTIMS password.

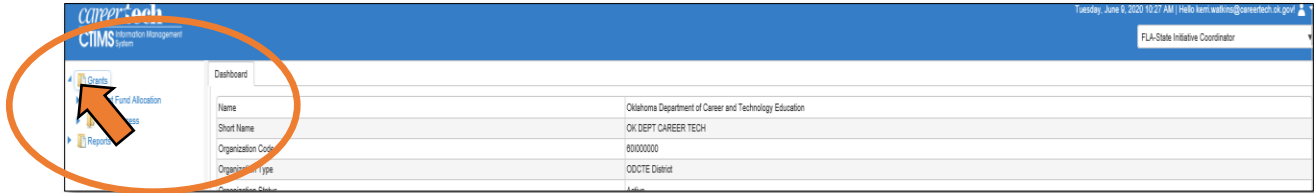


**IMPORTANT:** Please log into CTIMS using Mozilla Firefox , Google Chrome , or the latest version of Microsoft Edge  browsers.

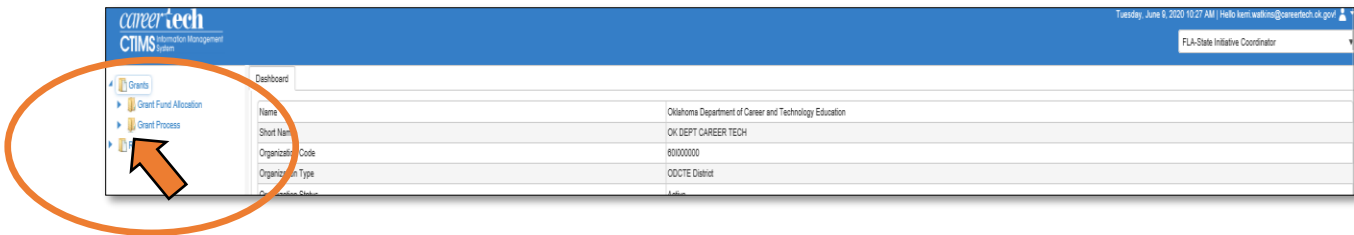
- Verify that you are signed in with the role of **FLA State Initiative Coordinator**. In the top right corner. Use the drop-down arrow to select this role.



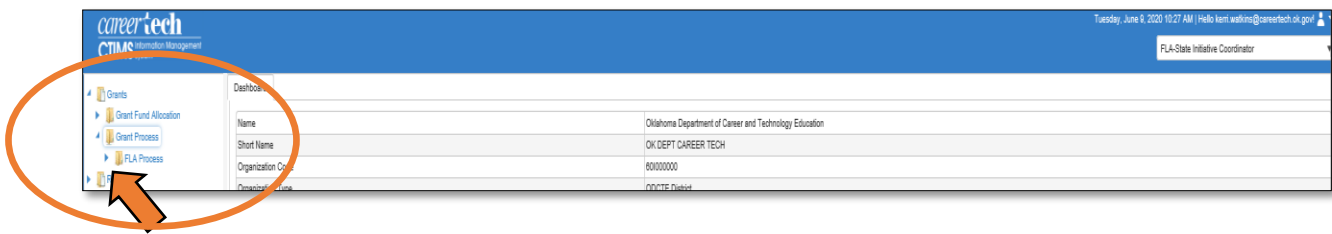
- Click the arrow ► next to **Grants** on left navigation.



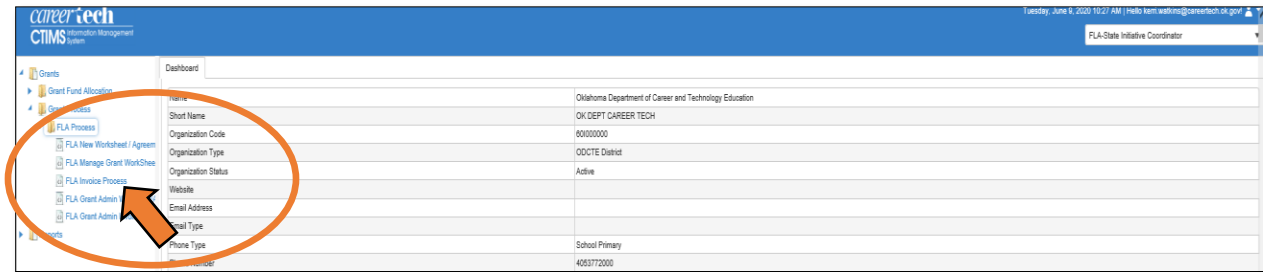
- Click the arrow ► next to **Grants Process** on left navigation.



- Click the arrow ► next to **FLA Process**.



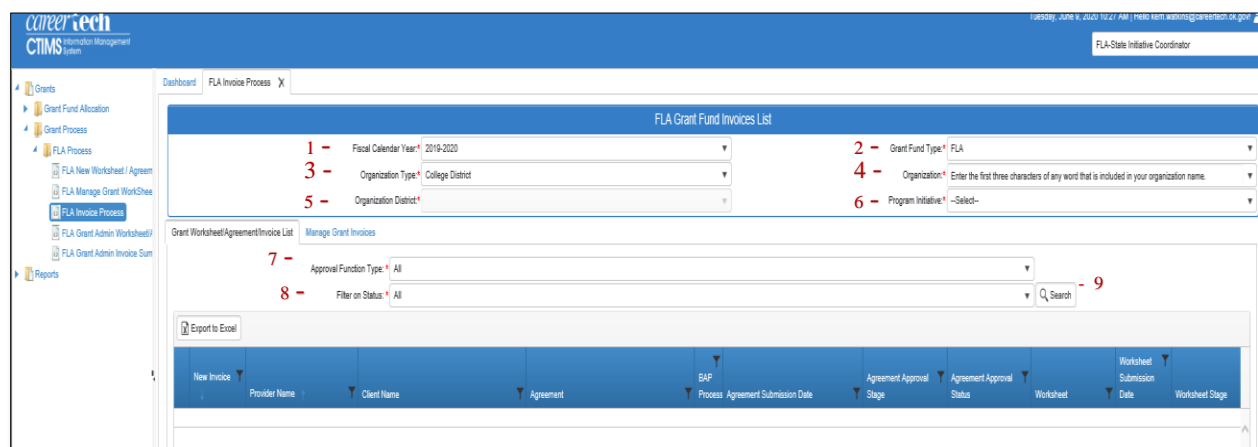
- Select **FLA Invoice Process** on the left navigation.



- Complete the requested information on the **FLA Grant Fund Invoices List** screen.

**NOTE:** The asterisks\* represents a required field.

1. Verify **Fiscal Calendar Year**
2. Verify **Grant Fund Type**
3. Select the **Organization Type** from the drop down menu
4. Select your **Organization** by typing in the first three characters of the name
5. Verify the **Organization District**
6. Select a **Program Initiative**
7. **Approval Function Type** will remain as **All**
8. **Filter on Status** will remain as **All**
9. Click **Search**



- Click the **Manage Grant Invoice** tab.

The screenshot shows the 'FLA Grant Fund Invoices List' page. The left sidebar contains a navigation menu with 'Grants' expanded, showing options like 'Grant Fund Allocation', 'Grant Process', 'FLA Process', 'FLA New Worksheet / Agreement', 'FLA Manage Grant Worksheet', 'FLA Invoice Process' (selected), 'FLA Grant Admin Worksheet', and 'FLA Grant Admin Invoice Summary'. The main content area has a header 'FLA Grant Fund Invoices List' and filters for 'Fiscal Calendar Year' (2019-2020), 'Organization Type' (College District), 'Organization District', 'Grant Fund Type' (FLA), 'Organization' (Meridian Technology Center), and 'Program Initiative' (-Select-). Below the filters is a 'Grant Worksheet/Agreement/Invoice List' section with a 'Manage Grant Invoices' link highlighted by an orange circle and an orange arrow. There is also a 'Filter on Status' dropdown and a 'Search' button. At the bottom, there is an 'Export to Excel' button and a table with columns: 'New Invoice', 'Provider Name', 'Client Name', 'Agreement', 'BAP Process', 'Agreement Submission Date', 'Agreement Approval Stage', 'Agreement Approval Status', 'Worksheet Submission Date', and 'Worksheet Stage'.

- From the list, click on the **Invoice Number** of the invoice you need to review and approve.

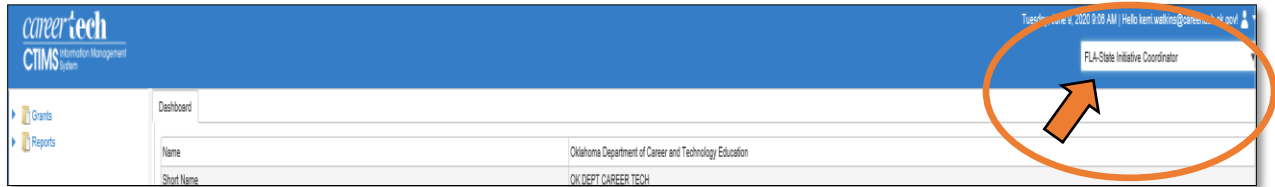
The screenshot shows the 'FLA Grant Fund Invoices List' table. The table has columns: 'Status', 'BAP Process', 'Days', 'Organization', 'Client Name', 'Program Initiative', 'Invoice', 'Invoice No.', 'Invoice Submitted On', 'Last Approval Stage', and 'Last Approval Status'. An orange arrow points to the 'Invoice' column, specifically to the value 'INV-1920-FLA-FLA-CPTCS-423-16X111745-74FD2...'. The table contains three rows of data, all for 'Meridian Technology Center' and 'MERIDIAN TECH CENTER DISTRICT'.

Status	BAP Process	Days	Organization	Client Name	Program Initiative	Invoice	Invoice No.	Invoice Submitted On	Last Approval Stage	Last Approval Status
Yes	No	0	Meridian Technology Center	MERIDIAN TECH CENTER DISTRICT	Carl Perkins Tech Center Second...	INV-1920-FLA-FLA-CPTCS-423-16X111745-74FD2...	73D7	09/09/2020 08:55:13	Local Finance Coordinator	App
Yes	No	0	Meridian Technology Center	MERIDIAN TECH CENTER DISTRICT	Carl Perkins Tech Center Second...	INV-1920-FLA-FLA-CPTCS-423-16X111745-A932A...	407B	01/13/2020 10:31:58	ODCTE Finance Reviewer	App
Yes	No	0	Meridian Technology Center	MERIDIAN TECH CENTER DISTRICT	Carl Perkins Tech Center Second...	INV-1920-FLA-FLA-CPTCS-423-16X111745-6AFC2...	78EC	10/10/2019 14:56:40	ODCTE Finance Reviewer	App

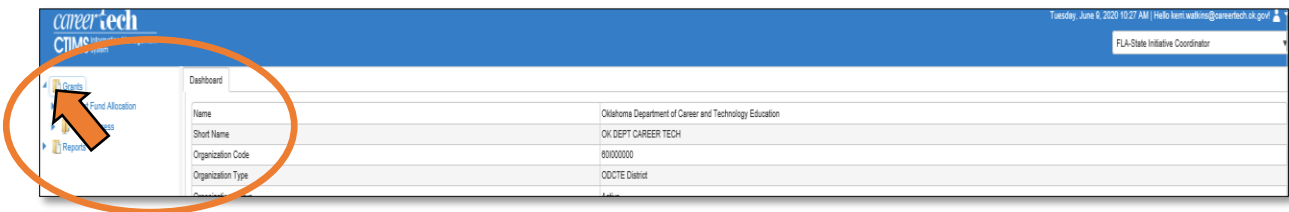
## Accessing the Invoice – Option 2

This option allows you to access invoices for all initiatives, all organization types and all organizations. Or, choose to more specifically.

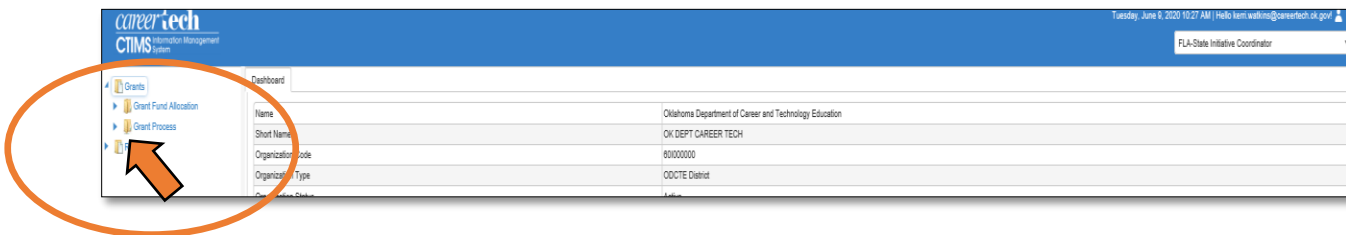
- Verify that you are signed in with the role of **FLA State Initiative Coordinator**. In the top right corner. Use the drop-down arrow to select this role.



- Click the arrow next to **Grants** on left navigation.

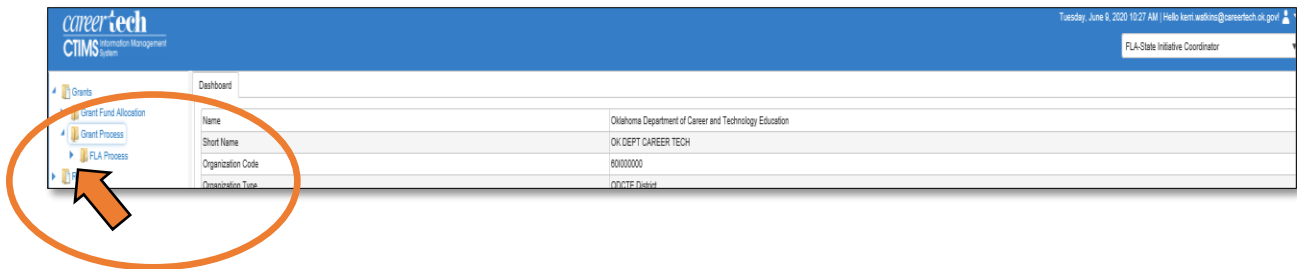


- Click the arrow next to **Grants Process** on left navigation.

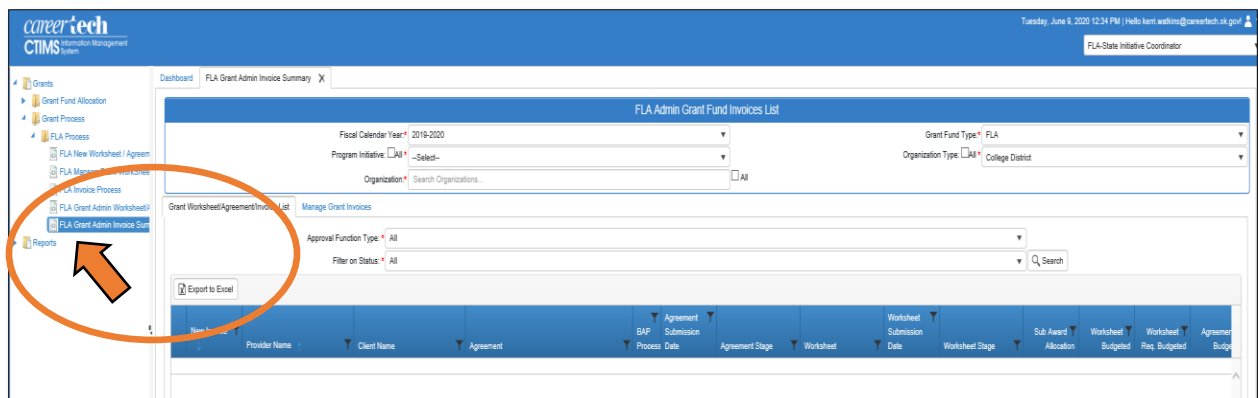




- Click the arrow |▶ next to **FLA Process**.



- Select **FLA Grant Admin Invoice Summary** on the left navigation menu.



- Complete the requested information on the **FLA Grant Fund Invoices List** screen.

**NOTE:** The asterisks\* represents a required field.

1. Verify **Fiscal Calendar Year**
2. Verify **Grant Fund Type**
3. Select the **Program Initiative** from the drop down menu, or check the box for **All**.
4. Select your **Organization Type** from the drop down menu, or check the box for **All**.
5. Select the **Organization** by typing the first three letters of the name, or check the box for **All**.
6. Click the **Manage Grant Invoices** tab.

- Use the scroll bar at the bottom of the results to scroll over.
- In the **Current Stage** column, click on the filter icon and filter for your approval role.

Program Initiative	Invoice	Invoice Submitted On	Last Approval Stage	Current Approval Stage	Current Approval Status	Invoice Summary	SOU	Worksheet
Carl Perkins Tech Center Second...	INV-1920-FLA-FLA-CPTCS-423-16X111745-74FD2...	06/09/2020 08:55:13	Local Finance Coordinator	Approved	State Initiative Coordinator - 2nd Approval Stage	...	N/A	WS-1920-FLA-FLA-CPTCS-423-16...
High Schools That Work (State)...	INV-1920-FLA-FLA-CPHS-S-478-55004050-077088...	04/19/2020 20:31:07		New-Draft		...	N/A	WS-1920-FLA-FLA-CPHS-S-478-5...
Carl Perkins Tech Center Second...	INV-1920-FLA-FLA-CPTCS-423-12X111745-7A21A...	04/17/2020 19:06:58		New-Draft		...	N/A	WS-1920-FLA-FLA-CPTCS-423-12...
Carl Perkins Post-Secondary Loc...	INV-1920-FLA-FLA-CPPS-422-16A000050-44833F8...	04/17/2020 10:39:39	Local Finance Coordinator	Approved	State Initiative Coordinator - 2nd Approval Stage	...	N/A	WS-1920-FLA-FLA-CPPS-422-16A...
Carl Perkins Tech Centers That...	INV-1920-FLA-FLA-CPTCTW-429-23X111745-D981...	04/17/2020 09:37:24	Local Finance Coordinator	Approved	State Initiative Coordinator - 2nd Approval Stage	Pending	Invoice Su...	WS-1920-FLA-FLA-CPTCTW-429-2...
Carl Perkins High School Second...	INV-1920-FLA-FLA-CPHS-421-72001050-249F0C...	04/17/2020 00:00:00		New-Draft		Pending	Invoice Su...	WS-1920-FLA-FLA-CPHS-421-72...
Carl Perkins Tech Center Second...	INV-1920-FLA-FLA-CPTCS-421-21X111745-8ED10...	04/16/2020 15:53:22	Local Finance Coordinator	Approved	State Initiative Coordinator - 2nd Approval Stage	Pending	Invoice Su...	WS-1920-FLA-FLA-CPTCS-421-21...
Carl Perkins Post-Secondary Loc...	INV-1920-FLA-FLA-CPPS-422-21X111745-2888117...	04/16/2020 14:57:00	Local Finance Coordinator	Approved	State Initiative Coordinator - 2nd Approval Stage	Pending	Invoice Su...	WS-1920-FLA-FLA-CPPS-422-21X...
Carl Perkins High School Second...	INV-1920-FLA-FLA-CPHS-421-68000050-7EF4ED...	04/16/2020 12:37:12	Local Finance Coordinator	Approved	State Initiative Coordinator - 2nd Approval Stage	Pending	Invoice Su...	WS-1920-FLA-FLA-CPHS-421-68...
Carl Perkins High School Second...	INV-1920-FLA-FLA-CPHS-421-68000050-3419F8...	04/16/2020 12:29:24		New-Draft		Pending	Invoice Su...	WS-1920-FLA-FLA-CPHS-421-68...
Carl Perkins Supplemental - Tran...	INV-1920-FLA-FLA-CPS-GTT-424-21X111745-5300...	04/16/2020 12:08:08	Local Finance Coordinator	Approved	State Initiative Coordinator - 2nd Approval Stage	Pending	Invoice Su...	WS-1920-FLA-FLA-CPS-GTT-424...
Carl Perkins Supplemental - Care...	INV-1920-FLA-FLA-CPS-CD-424-23X111745-88446...	04/16/2020 11:07:54	Local Finance Coordinator	Approved	State Initiative Coordinator - 2nd Approval Stage	Pending	Invoice Su...	WS-1920-FLA-FLA-CPS-CD-424-2...
Carl Perkins Tech Center Second...	INV-1920-FLA-FLA-CPTCS-423-23X111745-DD06C...	04/16/2020 10:39:44	Local Finance Coordinator	Approved	State Initiative Coordinator - 2nd Approval Stage	Pending	Invoice Su...	WS-1920-FLA-FLA-CPTCS-423-23...
Carl Perkins Tech Centers That...	INV-1920-FLA-FLA-CPTCTW-429-25X111745-C091...	04/15/2020 14:59:42	Local Finance Coordinator	Approved	State Initiative Coordinator - 2nd Approval Stage	Pending	Invoice Su...	WS-1920-FLA-FLA-CPTCTW-429-2...
Carl Perkins High School Second...	INV-1920-FLA-FLA-CPHS-421-68000050-3419F8...	04/15/2020 13:11:57	Local Finance Coordinator	Approved	State Initiative Coordinator - 2nd Approval Stage	Pending	Invoice Su...	WS-1920-FLA-FLA-CPHS-421-68...

## Reviewing/Approving the Invoice

- To review the Invoice Summary, click the link in the **Invoice Summary** column.

Dashboard | FLA Grant Admin Invoice Summary

FLA Admin Grant Fund Invoices List

Fiscal Calendar Year: 2019-2020  
 Program Initiative: All  
 Organization: Search Organizations... All

Grant Worksheet/Agreement/Invoice List | Manage Grant Invoices

Save changes | Cancel changes | Export to Excel | Refresh

Program Initiative	Invoice	Invoice Last 4 Digit Request No.	Invoice Submitted On	Last Approval Stage	Last Approval Status	Current Approval Stage	Current Approval Status	Invoice Summary	SOU	Worksheet
Carl Perkins Tech Center Second...	INV-1920-FLA-FLA-CPTCS-423-16X111745-74FD2...	73D7	08/09/2020 08:55:13	Local Finance Coordinator	Approved	State Initiative Coordinator - 2nd Approval Stage	Pending	<a href="#">Invoice Su...</a>	N/A	WS-1920-FLA-FLA-CPTCS-423-16...
Carl Perkins Post-Secondary Loc...	INV-1920-FLA-FLA-CPPS-422-16A000050-44B33F8...	BD63	04/17/2020 10:30:36	Local Finance Coordinator	Approved	State Initiative Coordinator - 2nd Approval Stage	Pending	<a href="#">Invoice Su...</a>	N/A	WS-1920-FLA-FLA-CPPS-422-16A...
Carl Perkins Tech Centers That...	INV-1920-FLA-FLA-CPTCTW-429-23X111745-D9B1...	94E7	04/17/2020 09:37:24	Local Finance Coordinator	Approved	State Initiative Coordinator - 2nd Approval Stage	Pending	<a href="#">Invoice Su...</a>	N/A	WS-1920-FLA-FLA-CPTCTW-429-2...
Carl Perkins Tech Center Second...	INV-1920-FLA-FLA-CPTCS-421-21X111745-9ED10...	4B0A	04/16/2020 15:53:22	Local Finance Coordinator	Approved	State Initiative Coordinator - 2nd Approval Stage	Pending	<a href="#">Invoice Su...</a>	N/A	WS-1920-FLA-FLA-CPTCS-421-21...

- To approve the invoice after review, click on the **Invoice Number** in the Invoice column.

Dashboard | FLA Grant Admin Invoice Summary

FLA Admin Grant Fund Invoices List

Fiscal Calendar Year: 2019-2020  
 Program Initiative: All  
 Organization: Search Organizations... All

Grant Worksheet/Agreement/Invoice List | Manage Grant Invoices

Save changes | Cancel changes | Export to Excel | Refresh

Program Initiative	Invoice	Invoice Last 4 Digit Request No.	Invoice Submitted On	Last Approval Stage	Last Approval Status	Current Approval Stage	Current Approval Status	Invoice Summary	SOU	Worksheet
Carl Perkins Tech Center Second...	INV-1920-FLA-FLA-CPTCS-423-16X111745-74FD2...	73D7	08/09/2020 08:55:13	Local Finance Coordinator	Approved	State Initiative Coordinator - 2nd Approval Stage	Pending	<a href="#">Invoice Su...</a>	N/A	WS-1920-FLA-FLA-CPTCS-423-16...
Carl Perkins Post-Secondary Loc...	INV-1920-FLA-FLA-CPPS-422-16A000050-44B33F8...	BD63	04/17/2020 10:30:36	Local Finance Coordinator	Approved	State Initiative Coordinator - 2nd Approval Stage	Pending	<a href="#">Invoice Su...</a>	N/A	WS-1920-FLA-FLA-CPPS-422-16A...
Carl Perkins Tech Centers That...	INV-1920-FLA-FLA-CPTCTW-429-23X111745-D9B1...	94E7	04/17/2020 09:37:24	Local Finance Coordinator	Approved	State Initiative Coordinator - 2nd Approval Stage	Pending	<a href="#">Invoice Su...</a>	N/A	WS-1920-FLA-FLA-CPTCTW-429-2...
Carl Perkins Tech Center Second...	INV-1920-FLA-FLA-CPTCS-421-21X111745-9ED10...	4B0A	04/16/2020 15:53:22	Local Finance Coordinator	Approved	State Initiative Coordinator - 2nd Approval Stage	Pending	<a href="#">Invoice Su...</a>	N/A	WS-1920-FLA-FLA-CPTCS-421-21...

- On the **FLA Grant Submit Invoice - Step 1** screen, click **Next Step**.

Dashboard | FLA Grant Admin Invoice Summary | INV-1920-FLA-FLA-CPTCS-423-16X111745-74FD2E8C73D7

FLA Grant Submit Invoice - Step 1

Provider Organization Details

Fiscal Calendar Year: 2019-2020  
 Organization Type: Tech Center Districts  
 Organization: Meridian Technology Center  
 Worksheet No: WS-1920-FLA-FLA-CPTCS-423-16X111745-78ACA4B5B58D  
 Agreement No: WSAG-1920-FLA-FLA-CPTCS-423-16X111745-8DC277FCEB8  
 Invoice No: INV-1920-FLA-FLA-CPTCS-423-16X111745-74FD2E8C73D7

Basic Client Information

Project Details

Refresh | Next Step

# CTIMS Helpful Tips

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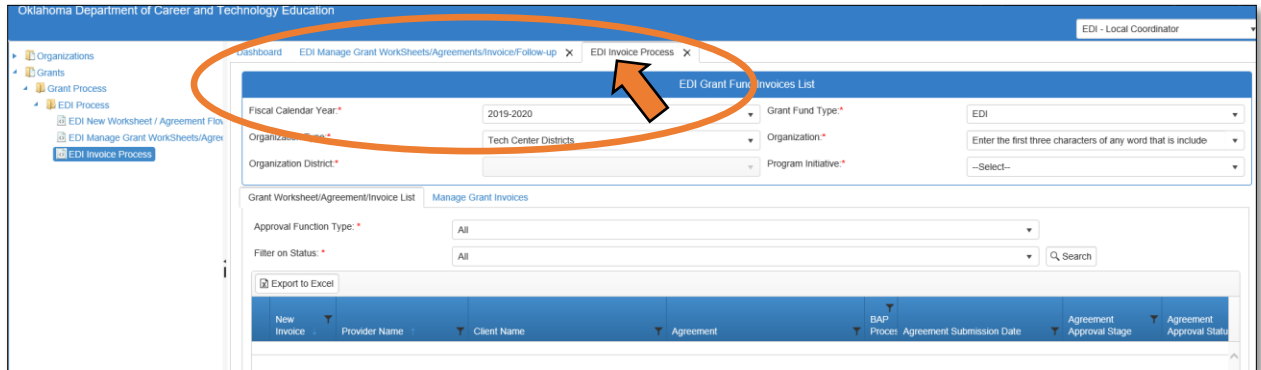
**OKLAHOMA**  
**CareerTech**



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**IMD** Information Management Division

## Helpful Tips

- There are scroll bars located at the bottom and right of some of the screens in CTIMS. If you cannot see all of the information on a screen, go to the right or bottom of the screen and use the scroll bar to see navigate over to view additional columns and rows.
- You can flip between screens or tabs in CTIMS. Click on any open tab at the top of your screen to toggle between them.



- There are tabs within screens in CTIMS. Look for these tabs to view a different screen or more information.
- Many sections in CTIMS can be expanded in order to view more detailed information by clicking on the +(plus) sign or an arrow ► next to the section header or line (row).
- Hold down the Ctrl key and click on the + or – keys to zoom in or out.
- Do not use the Print icon  to print documentation. Use the save icon  to download a pdf, then you can save it to your computer or print the pdf.
- You can only have 10 tabs open at one time. To close tabs, click on the ✕ on the right side of the tab you wish to close, then confirm that you would like to close by clicking OK on the confirmation screen.